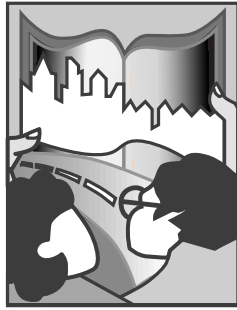
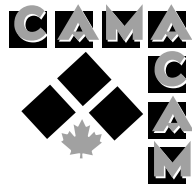


LITERATE
CITIES



LES VILLES ET
L'ALPHABÉTISATION

A Guide for Planning and Conducting an Organizational Needs Assessment for Municipal Workplace Literacy Programs



CANADIAN ASSOCIATION
OF MUNICIPAL ADMINISTRATORS

L'ASSOCIATION CANADIENNE
DES ADMINISTRATEURS MUNICIPAUX

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We hope this Guide will be a valuable tool for municipal stakeholders who are embarking on a new journey of discovery. Their commitment to establishing a meaningful workplace education/literacy program will reap benefits that will be felt in the workplaces, homes and communities in which they live.

Bruce E. Thom, Q.C.
President

Ken Meech
Past President

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Preface

Who this workbook is for

This workbook is for stakeholder committee members or others in a role responsible for planning and implementing workplace education programs for municipal employees. The handbook will provide you with suggestions on how to plan and carry out an Organizational Needs Assessment (ONA) in a way that suits your workplace. The ONA is one of the first activities in the program planning process. It helps determine what programs should be offered and how they should be offered. The ONA results will assist you in determining program policy as well.

*To be truly successful,
equal representation
from the union and
management is essential.
Both workers and
management have to
be on board to make it
palatable. I think it really
makes a difference.*

Jim Jensen
CUPE Local 825
City of Port Moody

A joint approach

This guide assumes that there is commitment from both management and labour to explore the need for, and develop educational programs that provide opportunities for workers to enhance their foundational skills in reading, writing, math as well as technological skills for the work environment. It also presumes that a workplace education “stakeholder” planning committee made up of representatives¹ of unions and management is already in place to oversee the planning and implementation of such programs.

A definition of literacy

This guide uses the definition of “literacy in the municipal work force” as developed by the Literacy in the Municipal Workforce Project in 1994:²

Literacy in the municipal workforce³ means:

- Recognizing the fundamental need for workforce literacy;
- Providing opportunities for workers to acquire education in the municipal workplace, which will enable them to participate more fully in their work environment, home and community. Workplace programs may include basic skills (reading, writing, numeracy) as well as technological skills necessary for the work environment.

¹Equal numbers of labour and management representatives is strongly recommended and is the ideal, but may not always be possible.

²Nutter, P. (2000). *The writing's on the wall: Implementing a municipal workforce literacy program, an organizer's guide.*

³This is the Literate Cities definition. It can be tailored to suit the unique needs/characteristics of the municipal workforce involved.

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How this workbook can help

This workbook provides you with a process for planning and conducting the ONA. You will need to adapt this process to your own workplace realities and sensitivities. The workbook includes suggestions on how to prepare for and plan the ONA, carry it out, make recommendations, and present the results to key decision makers and stakeholders. It also includes the experience of those involved in the planning of municipal workplace education programs through quotations on the left-hand side of the page.

Throughout this workbook you will find a series of practical questions that your committee may choose to use in its planning process. These questions are also included separately as worksheets 1-4 in Appendix 2 for easy photocopying. After each chapter title, you will find a subheading that tells you what worksheets, if any, are needed for that chapter.

What the workbook includes

Chapter 1 provides an overview of the ONA and information to help you get started. Chapter 2 looks at planning the ONA. Chapter 3 focuses on the implementation phase. Chapter 4 examines how to put a report with recommendations together along with reporting the findings to key stakeholders. Chapter 5 looks at ways to evaluate the ONA process. Appendix 1 includes a selected bibliography and Appendix 2 includes 4 worksheets for the committee.

Chapter 1: Getting Started

Chapter 1 outlines what an ONA is and why it is a critical component in planning your workplace education initiative. It describes how the ONA is different from other kinds of assessments. You will also find a list of pre-ONA planning steps that should be completed before you undertake an ONA.

A. An overview of the ONA

We wanted to know what we were dealing with and what our employees needed. We put together a committee with representation from union and management. The best way to get started was to find out the needs of the employees in the municipality.

Kathy DeWitt
City of Moncton

The ONA helps you figure out where literacy and basic skills fit into the organization. It is important because it shows how these skills link to other training and it builds awareness about why they are important.

I have done programs without an ONA and it was fine, but without one basic skills can remain a stand-alone issue and not be integrated into the organization.

Sylvia Sioufi
CUPE National Literacy
Coordinator

◆ What is an ONA?

The ONA is a collective assessment that provides information on what programs should be offered and how they can be offered in accessible ways.

It is a systematic way of getting a “big picture” understanding of the educational needs in your workplace especially with respect to foundational skills. It takes place before any programs are offered. The ONA process involves consulting with people across your workplace through interviews, meetings or surveys to see what should be offered. Your committee can use the ONA as a planning tool to document the overall needs and goals of both management and workers, and make recommendations on the basis of the findings.

The ONA will help you to determine what programs to offer, and how to offer them in a way that will ensure that the goals of all interest groups are met. You will also be able to identify both the opportunities for making your program work successfully and barriers that will need to be overcome within your unique workplace culture.

Think of the ONA in the same way you might think about planning a road trip with a group of people who want to do different things on the trip. Imagine that you have generally decided on your destination, but that is all. You and the other members of your group would then have to negotiate and do research on a route, places to stay, activities to do that are within the budgets, time frame and interests of each group member and meet their goals for the trip.

Workplace education, just like a trip, involves upfront planning that provides a foundation for success. The ONA provides you with a road map to help you get to your destination.

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One program had good rapport without consulting with employees and their program took off with a bang. But then it fizzled out with no commitment from a joint committee. You need both management and union commitment to make it work.

Patricia Nutter
CAMA Literate Cities
Project

The ONA told us basically where people were at and where to help improve the workplace. It gave us an idea of where people stood in different areas. The biggest finding was a list of the areas where people wanted programs. The committee made recommendations and we started with basic computer courses. We had more participants than we could accommodate.

The ONA was key in focusing our ideas and getting us started. We could have said that we will offer "such and such" but we needed the input of employees to tell us what they needed. The ONA tells us where we are at so we don't fumble and have the program fall flat. It shows what employees want and what departments and managers want. Everyone is a winner.

Kathy DeWitt
City of Moncton

◆ What an ONA isn't

Sometimes there is confusion between the ONA and other kinds of assessments especially those that assess individual needs. The ONA isn't an individual needs assessment although sometimes people talk about their individual needs and goals during the ONA process. An individual needs assessment happens after people have signed up for a program.

An ONA is also different from a literacy task analysis which identifies the literacy components of different jobs.

◆ Why an ONA is important

There are many important reasons for conducting an ONA. The major reason is that as an inclusive process, the ONA gains the perspectives of all corners of the workplace with respect to educational goals, needs and motivations for workplace education.

It also identifies the interests of workers and management and makes these transparent to everyone. The results of the ONA provide a comprehensive picture on which to base all other decisions related to your workplace education program.

Other important reasons for conducting an ONA include:

- ✓ gaining support for the workplace education initiative from across the workforce by consulting with people in a respectful way
- ✓ building people's confidence by focusing on collective needs, goals and assets and not singling people out
- ✓ finding out what skills and talents people have that they might be willing to share through mentoring arrangements or peer training
- ✓ identifying points of agreement with respect to labour and management's perspectives on the program and program policy
- ✓ understanding the lay of the land and the organizational climate and culture in which decisions about the workplace education initiative will take place
- ✓ identifying ways to make programs be accessible and comfortable for people, so that they will be encouraged to get involved later on
- ✓ identifying barriers to getting programs off the ground and possible solutions for overcoming the barriers
- ✓ ensuring that realistic expectations are set for what a workplace education program can and cannot address
- ✓ identifying additional strategies other than programs to address issues of print and oral communication
- ✓ providing a case for workplace education for municipal decision makers and funders

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Our joint committee decided the direction the project would take. We were stuck as to how widespread the need was or even if there was a concern. We decided we would take two approaches. First a memo went out from the City Manager asking supervisors and department heads to participate in a survey. Second, the unions did a random sample of their members with a similar survey.

Elizabeth Rideout
City of St. John's

Generally the ONA has been done by the committee, sometimes in partnership with other organizations or consultants. It's important that it be done in a cost effective way. There are pros and cons of using an outside person as opposed to doing it internally. An outside person can get more in-depth information especially if there is conflict. But a committee that is working well can be equally effective.

Patricia Nutter
CAMA Literate Cities
Project

◆ What the principles are that support an ONA

The ONA process is meant to build support from the ground up through union/management collaboration as opposed to an approach where the decisions are made from the top down. The leadership for the ONA should come from the stakeholder committee process. The consultation should be with both management and workers from various parts of the workplace.

The ONA process assumes that everyone in the workplace has something to learn and that everyone has something to teach someone else. It builds on people's strengths rather than focusing on deficits. It pays attention to people's ideas, their goals and the realities of their every day work life. On the other hand, it also recognizes that in many cases workers have had fewer opportunities for development and that the workplace education initiative should provide those opportunities.

B. What are the first steps?

Before your committee starts planning the ONA strategy, consider the following:

- Does the committee have the support of senior management and the union executive to carry out the ONA? Does it have the support of elected representatives and city council, as well?
- Does the committee have balanced representation from unions and management, reflect the diversity of the workplace, and have members who are empowered to participate in the process? Is there anybody else who should be on the committee?
- Is there a joint committee decision-making process in place including a process for resolving conflict? What are the parameters of the decision making process? When do management and labour representatives have to take issues for decision making to their own constituencies?
- Does the committee have the resources it needs to carry out this work? For example, do members have support from their managers in terms of the time needed to plan and carry out the ONA? Are there resources for scheduling and paperwork? Are there meeting rooms available? Are there financial resources available to the committee to hire an outside facilitator if one is needed?
- Has the committee set an overall goal for the workplace education program? The City of St. John's, NF, provides a good example. The stakeholder committee agreed on two goals: (1) to raise awareness with all City employees about the workplace literacy program; and (2) to enable workers to take advantage of workplace education opportunities in a non-threatening environment.⁴

⁴Nutter, P. (2000). *The writing's on the wall: Implementing a municipal workforce literacy program, an organizer's guide.*

C. Who should carry out the ONA?

There is no one right way to conduct an ONA. Some municipal workplaces have conducted their ONAs using internal resources. Others have hired an external facilitator or education provider to assist in planning and carrying out the ONA. Some of the factors that will help you decide which way to go include:

- the financial resources available to your committee to hire an outside resource
- the level of comfort and experience within the committee itself to carry out the ONA
- the level of comfort and trust the workforce will have with committee members collecting information

Some committees will see an outside consultant as a more effective way to gather information because this person may be seen to be less invested in certain outcomes. On the other hand, workers may be more comfortable talking to other workers or their union representatives.

The decision to use an outside consultant or not needs to be considered carefully. In a committee process, the human resources representative may have more experience with planning and interviewing than other committee members. It might be easy for a committee to decide that this person should carry out the ONA.

Unfortunately, this could create a power imbalance and workers in this situation could feel hesitant in participating because they see their confidentiality being compromised.

Chapter 2: Planning the ONA

Committee Materials: Worksheets 1, 2, and 3

Chapter 2 looks at all aspects of planning the ONA. This includes developing the ONA strategy and an effective communication plan. It also contains information on how you can develop an informal evaluation of the ONA process to see if you achieved your goals.

A. Designing the ONA strategy

We had an outside person who made suggestions on the questionnaire. We gave him the raw data and he analyzed the results and made recommendations.

Elizabeth Rideout
City of St. John's

◆ What has your experience been like?

In the workplace and outside, you have probably had the experience of being interviewed one-on-one, or in group meetings where others wanted your opinions. Or you may have had to fill in a written questionnaire.

What was your best experience? What made it a positive experience?

What was your worst experience? What made it a negative experience?

Your own collective experience as committee members with consultation processes can have a powerful effect in ensuring that the ONA is planned and carried out in a positive, respectful way.

Our terms of reference as a joint committee was to represent key stakeholders, identify needs, respond to identified needs by designing programs, and recommend programs and policies.

Jim Jensen
CUPE Local 825
City of Port Moody

◆ What is your goal for the ONA?

Your goal for the ONA will provide overall direction for what you want to accomplish through this process. Your goal will also be what you use to communicate with the work force about the ONA and get people participating in the ONA process. You will want to ensure that the goal for the ONA avoids technical jargon and is in line with your overall program goal.

Questions for you to consider:

1. Why does management want a workplace education program?

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We wanted to get an overview of the workplace changes, the implications of these changes and effect on training; generally an over- view of the basic skills needs and where people would like to learn more.

Kathy DeWitt
City of Moncton

2. Why is the union interested in a workplace education program?

3. What aspects of the workplace education initiative do workers and management agree/disagree on?

4. Think about what you want to find out through the ONA. What are some key phrases that could be incorporated into your goal statement that represent the commonalities in these interests in a respectful way?

◆ What will you call your workplace education initiative?

Even at this early planning stage for the ONA, it will be important to give your program a positive name. Some municipal workplaces have called their program the Workplace Education Program. Others like the program in Port Moody, B.C. call their program the Workplace Communication Skills Development Program.⁵

◆ Who will the participants in the ONA be?

Generally, the participants in the ONA include a cross-section of workers, supervisors and managers in the workplace. Some workplace education programs focus on one or two departments in a municipal workplace. Smaller workplaces are able to include all departments. You do not need to involve every person. A good cross section will do.

You may want to include more representation from areas that you know are going through change and where people have expressed a desire for training and upgrading.

What key groups at your workplace would provide helpful and important information on the educational issues you are looking at? Which groups are important to consult because their support for the program is critical?

A question for you to consider:

What groups (departments, job positions) should you include in your ONA?

I think that it is hard to say that there is one way to do an ONA. You have to consider the environment. During amalgamation may not be the best time for a committee to try to do it. If it is a large municipality, it might be good to have someone on the outside do it. In a smaller municipality you could do it internally.

An anonymous survey can work well to give you a sense of the work force but it should be done in conjunction with focus group discussions with supervisors and labour leaders.

Sylvia Sioufi
CUPE National Literacy
Coordinator

⁵Nutter, P. (2000). *The writing's on the wall: Implementing a municipal workforce literacy program, an organizer's guide.*

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Once you have listed the groups you want to include (departments, job positions, etc.) it is a good idea to develop a plan with the people you would like to target from each area and job position. You will also want to consider how many managers and supervisors you want to target. It is especially important to make sure that your plan includes an inclusive representation in terms of men and women, different ages, and the ethnic and racial diversity in your workplace.

I believe it takes an outside consultant to ask questions of employees. They will answer questions differently with an outside person. In our case they were very candid with our consultant. We got a good review and buy-in from employees.

It is important that employees trust the people on the committee. Union representation is really important, and union and management have to work together.

Kathy DeWitt
City of Moncton

People who couldn't read and write still wouldn't come forward. More people at a higher literacy level were the ones who responded to the ONA. We are still struggling with what we would do differently--people have to come forward on their own.

Elizabeth Rideout
City of St. John's

◆ What will the process be for participation?

Participation in the ONA is voluntary and the information gathered from people confidential. Usually committees communicate about the workplace education program and the ONA through meetings, e-mail, pay stub information or newsletters. People can usually contact committee members or there may be a sign up list in a central place.

You will find that as a committee member you may have to do some personal one-on-ones with people from the groups you want involved to encourage them to be part of this consultation process.

◆ Who will collect information from participants?

Again this is a decision that you will need to make as a committee. Please see page 12.

If you decide that committee members will conduct the ONA, you will need to consider issues of participant confidentiality and safety. For example, it would make sense to have committee members canvas their peers. Avoid situations where supervisors or managers are talking to workers.

You may also consider offering some training to the committee on interviewing or facilitating groups so that you get consistent information across the board.

You might use an internal resource inside your organization to do this training or you could hire someone from the outside. Another strategy for conducting the ONA is to have two committee members work together.

◆ What's the best way to collect information from participants in the ONA?

There are several ways or combinations of ways that you can use to get the information you need for the ONA. What you choose to do will depend on your workplace culture, labour/management relations, and people's comfort level with these methods. The most common ways are:

- ◆ one-on-one interviews
- ◆ focus group interviews or meetings
- ◆ written questionnaires

In some cases, people may be reluctant to complete a written questionnaire for a variety of reasons. They may feel exposed because of their skills, or vulnerable

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because they see the written word as powerful and permanent. Some people feel support talking in a group situation with their co-workers. Others will say more in a one-on-one situation. As a committee, you will be able to develop a plan for consulting with people based on your in-depth knowledge of your workplace.

You may also want to do a plain language review of selected workplace documents to find out how easily they convey their message. It may also be useful to examine previous reports that identify training needs and training evaluations.

A question for you to consider:

Given your understanding of who you want to participate in the ONA and your ONA goal(s), what method or combination of methods would you recommend?

Our joint committee worked with an outside consultant with a lot of experience. He suggested a questionnaire for staff as a place to start. The questionnaire went out with people's pay stubs. We got a substantial response of 67% from our work force of 150. Through the questionnaire, we learned that people wanted to upgrade basic reading, writing and computers.

Human Resources also did some background work on other programs. We followed their format.

Jim Jensen
CUPE Local 825
City of Port Moody

◆ What do you want to find out?

Revisit your ONA goal(s). Given your overall goal(s), what do you want to find out from ONA participants? What questions will get at the information you are seeking?

You can adapt your questions to ensure that you are asking everybody about the same issues across the board.

Write up several questions that would get information in the following categories. Then think about how you might word them if you were trying to get the same information from 1) workers, 2) managers, 3) supervisors, 4) union representatives. Use the broad areas below as prompts to help you develop your questions:

- ◆ any changes at the workplace that require additional essential skills
- ◆ motivations for attending a workplace education program
- ◆ upgrading needs and interests in the area of foundational skills
- ◆ how to make resulting programs appealing and accessible
- ◆ skills and talents that people would be willing to share

Sample questions might include:

What kinds of changes have happened at the workplace that call for you to use different or additional skills?

How comfortable are people here with the paperwork they have to do, like report writing, form filling, reading documents, etc.?

What things would you like to learn at work if you had the chance?

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Your questions

Now it is your turn to develop some sample questions. Develop them so they are open-ended by using words like what, how, why, when and who. Avoid overusing questions where people just have to answer yes or no.

You have to get back to your people to find out if what you are doing is effective and whether or not you need to change direction.

Jim Jensen
CUPE Local 825
City of Port Moody

B. Develop a communication strategy for the ONA

Clear, consistent, ongoing, upbeat communication about the workplace education program generally, and the ONA specifically, is critical to the success of your initiative. The stakeholder committee will need to plan an ongoing communication strategy to keep people in the loop and build their support for the program.

◆ What makes a successful communication strategy for the ONA?

During the planning phase to develop the ONA strategy, it will be important to figure out:

- **how** the committee will let people know about the workplace education program and the ONA

For example, you could present information:

- ✓ at general workplace meetings
 - ✓ at union meetings
 - ✓ at departmental meetings
 - ✓ in a notice with people's pay cheques
 - ✓ in notices on workplace and union bulletin boards
- **who** is going to prepare the material for this initial part of the communication strategy

You will also want to plan out how to circulate this material in order to get feedback from other committee members.

- **who** is going to present information at meetings and send out or post written information
- **what kind** of sign up process you will use for getting participation in the ONA
- **what kind** of preparation might be needed so committee members feel comfortable making presentations

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Once you have provided initial information about the ONA, it will be important to keep communicating with people along the way. Strategic times to communicate with the workforce about the ONA include:

- ✓ just before the ONA is going to take place
- ✓ right after with a thank you to those who participated
- ✓ after the report is complete and key decision makers have accepted a plan for program implementation

Basically we had everyone from labourers to directors giving their input. It wasn't just someone saying "Here's what we're going to do." The committee was worried that people wouldn't sign up for the program but we had to run it twice. The program was tailored to exactly what people said they needed in the ONA.

Elizabeth Rideout
City of St. John's

A question to consider:

Given what you know about your workplace, what would be the best ways to communicate with people about the ONA?

C. How will you know if the ONA is successful?

It is important to evaluate the ONA planning and implementation process:

- ✓ to see if you accomplished your goal
- ✓ to see what worked well
- ✓ to find out what could be improved the next time or for other steps in the planning process for the workplace education initiative

At the end of the planning stage, you come up with a list of success indicators for the ONA that the committee can agree on. Examples of success indicators include:

- the actual number of people who participated in the ONA was the same as or greater than what we had planned
- we know what kinds of foundational skills programs to offer and how to make them attractive and accessible
- people found our communication about the ONA clear and complete

Be prepared to answer expectations that come out of the ONA by committing to look at them later. Be clear at the beginning that not everything may be addressed.

Sylvia Sioufi
CUPE National Literacy
Coordinator

Your ONA report with its recommendations will lead to an action plan for your program.

This is a good time to informally evaluate the ONA process. You could revisit your success indicators using a scale of 1 to 5, with 1 being 'not very well' and 5 being 'very well'. This would help you see how successful the ONA was, and what improvements are needed for another time.

Chapter 3: Carrying Out the ONA

This chapter focuses on tips for ensuring that the implementation of the ONA goes well. It focuses on “how-to” strategies for conducting one-on-one interviews and group meetings.

A. Setting a positive environment

By this time, you will have your interviews and focus groups scheduled and your meeting room chosen. There are a few things you can do to make sure that ONA participants have a positive experience.

Some suggestions include:

- ✓ make sure that interviews and group meetings take place in a quiet, comfortable, “neutral” room where confidentiality can be ensured.
- ✓ provide refreshments for participants emphasizing that their contribution is important
- ✓ emphasize that their contribution is important to the process
- ✓ have committee members available for introductions if the interviewer/facilitator is from outside the workplace

B. Tips for conducting effective interviews and group meetings

Interviews and group meetings share some similarities in their structure. In both cases, especially the group meeting, it would be important to have one person to facilitate and another to take notes.

For example, in both cases you will want to:

- start with introductions and an overview of the purpose of the ONA and assure people that the information they provide is confidential and anonymous
- start with routine questions, work into the “harder” questions gradually, and wind down to close the interview or meeting
- mirror back to people what they have said to ensure correct understanding
- thank people for their input and outline for them the next steps in the process

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◆ Interviews

Interviews require concentration. In order to keep the interview going smoothly there are a few things you can do. The best policy is to use your questions as a guide only. You may find that people answer your questions in a different order than you have them on your page. This is normal. You may also find that there are silences when you ask a question. Allow for the silences as people think about what they want to say. If a question seems to cause discomfort, ask the person if they would like to pass on the question. Build a deeper understanding of the person's responses by probing gently.

Keep careful notes on what exactly people say rather than your interpretation of what they say. Make sure you use codes and not names on your notes.

◆ Group meetings

Group meetings require special attention because there are more people. In addition, it is a creative process where people can build on each other's ideas. However, it is not a good idea to have workers and their supervisors or managers in the same group. Workers may fear repercussions if they speak honestly.

Confidentiality needs to be addressed first thing. Ask participants if they will agree to keep what is talked about within the room. Ask them to give you a show of hands that they will agree to this. You also need to assure people that you will not be using any names.

You may also want to begin with a bit of an ice-breaker that is fun and light and will increase the comfort level in the group.

Some people will be very comfortable speaking out in a group. Others will not. One way to address this situation is to start out by having people discuss some of the questions in small groups or pairs first. Then they can pool their answers in the large group. You or another person can record the key points and the similarities on flip chart paper. You can continue this small group process until you have completed all the questions.

◆ Questionnaires

If you have decided to use a questionnaire, make sure you have an envelope attached to the questionnaire with your program name, the name of a contact person, and a place where people can drop them anonymously.

Chapter 4: Writing the ONA Report and Presenting the Findings to Key Stakeholders

Committee Materials: Worksheet 4

This chapter will provide an overview of how to summarize and analyze information, and make recommendations for your ONA report. It will also look at presenting the findings to key stakeholders.

A. Summarize and analyze information from the ONA

◆ Look for patterns

You will want to go over all the information you have collected from interviews, focus groups, and questionnaires. Go through your notes, flip charts or questionnaires to identify patterns and similarities in what people have said. You can use colored markers or tabs to do this. Also identify the differences.

Whether or not the stakeholder committee or an outside resource has conducted the ONA, it will be critical that committee members come to agreement on the interpretation of the results and recommendations.

◆ Summarize the information

Write a summary of the findings by organizing the information into categories. For example, you would probably have a category that looked at what kinds of skills and knowledge people would be willing to share.

You would also have a category on how different people in the workplace view the foundational skills issue. Desired programs would be another category.

◆ Interpret the information

Once you have done a draft summary, go back and interpret your summary for each category. What do the summaries tell you? Your interpretation or analysis will make the link between the findings and the recommendations.

◆ Make recommendations

Go through your draft summary and analysis. Make your recommendations for your workplace education program. Your recommendations should deal with types of programs, program models, and program policy. You may have other recommendations that address foundational skills issues but are more an issue of everyday practice rather than a formal program. Be sure to highlight other subject areas that participants indicated they would like to learn about.

We (the committee) said that if we even had 15 participants, the program would be a success. We've had 327 people participate in the last 3 years.

A key factor is that we have our program on site. It came through the ONA that people did not want to be in a formal classroom.

Kathy DeWitt
City of Moncton

A Guide for Planning and Conducting an Organizational Needs Assessment for Municipal Workplace Literacy Programs

You will want to make sure that your recommendations are reasonable and doable within the particular culture of your workplace.

Consider the following:

The summary on the next page represents a finding from the ONA. Write down what your interpretation is and what your recommendation would be?

81% of participants identified upgrading of basic computer skills as a need. 92% of hourly workers and 100% of supervisors identified a need for learning basic computer skills for themselves or others. The participants' greatest motivation to upgrade these skills came from a desire to keep up with changing technology.

People want to be able to help their kids, use the computer for needs at home, help their co-workers and get other jobs where computer skills are important. Some managers see a need for increased computer skills for employees because there will be more computers at work in the future. Moreover, even if a person doesn't work with computers directly, they will have to interface with them in some way.

Interpretation:

Recommendation:

◆ Write the report

You have already done most of the work by summarizing and analyzing the information collected in the ONA and making recommendations. Now your task will be to put this in a report form.

Audience

The first aspect of the report you will need to consider is audience.

Like all other aspects of your workplace education initiative, you will need to consider the interests of both management and labour. How will you write the report so that both management and labour will endorse it and the recommendations you make? Your stakeholder committee will ensure that the report represents both these perspectives.

A Guide for Planning and Conducting an Organizational Needs Assessment for Municipal Workplace Literacy Programs

You will need to ensure that the report is written in clear and accessible language and design.

Report outline

As you write the report, the following outline may help you in deciding how to organize your own report.

- ✓ **introduction** – should provide some background to the workplace education initiative and the ONA
- ✓ **ONA Process** – should give an overview of how the ONA was planned and carried out as well as the role of the stakeholder committee
- ✓ **findings** – should present a summary of the findings from participants
- ✓ **analysis** – is a section that interprets the findings
- ✓ **recommendations** – based on the findings and analysis

Once you have a draft report, all committee members must have the opportunity to read it and give feedback. The report will most likely go through several revisions before everyone signs off on the final version.

When the report is close to final, you will also want to write an executive summary to include in the report. An executive summary should be brief, with an overview of the findings, analysis and recommendations.

B. Presenting the results of the ONA

Once your report is final, you will need to decide what key decision makers your report needs to go to. If you decide it goes to senior management and the union executive, you will need to decide whether or not to:

- ◆ send them the full report first before a presentation
- ◆ send them the executive summary before a presentation
- ◆ present an overview of the findings and give them the report at the meeting

If you present the key findings to decision makers, who will make the presentations? What you decide should reflect acceptable workplace culture and be the best strategy to get an endorsement of your recommendations.

You will also need to decide how you will make the findings available to the work force, especially those that participated in the ONA. You might:

- ◆ outline the findings and recommendations in a workplace or union newsletter
- ◆ make a presentation in departmental or union meetings
- ◆ let people know where they can pick up a copy of the full report or executive summary

The ONA might not be part of the culture of an organization. Working together could be a cultural shift for labour and management. In some workplaces, people may never have been asked what they think and may be apprehensive.

Your evaluation can evaluate the impact of the ONA. It's hard to evaluate it right away but you can do it later on. What was the impact of the ONA? What other training needs are there? How could you make the ONA better?

Sylvia Sioufi
CUPE National Literacy
Coordinator

C. Next steps

◆ Evaluate the ONA process

Remember back at the end of the planning process when you developed success indicators for the ONA? Now is the time to revisit those success indicators as a committee to see how well you achieved your objectives.

This process provides an ideal opportunity for you to discuss what worked well and why, and what needs to be improved. This discussion can provide new insights that will help you during the program implementation plan.

◆ Develop an implementation plan

Once you get the go-ahead from key decision makers to fully or partially carry out the recommendations you have made, you will want to sit down and develop an implementation plan.

Your plan will include developing a timeline of activities until programs are up and running. Some of the major activities that will form part of your plan will include:

- ✓ setting program objectives
- ✓ confirming a program model (for example, outside education providers, peer trainer, or learning centre)
- ✓ deciding on program providers (who will teach the programs)
- ✓ determining program policy (who can participate; how many people; 100% company time or shared time)
- ✓ developing individual learning plans
- ✓ marketing the program
- ✓ developing a program evaluation strategy

Appendix 1: Additional Resources

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Appendix 2: Committee Worksheets

Chapter 2: Planning the ONA

Worksheet 1: What has your experience been like?

In the workplace and outside, you have probably had the experience of being interviewed one-on-one, or in group meetings where others wanted your opinions. Or you may have had to fill in a written questionnaire.

What was your best experience? What made it a positive experience?

What was your worst experience? What made it a negative experience?

Chapter 2: Planning the ONA

Worksheet 2: What is your goal for the ONA?

Your goal for the ONA will provide overall direction for what you want to accomplish through this process. Your goal will also be what you use to communicate with the work force about the ONA and get people participating in the ONA process. You will want to ensure that the goal for the ONA avoids technical jargon and is in line with your overall program goal.

Questions for you to consider:

Why does management want a workplace education program?

Why is the union interested in a workplace education program?

What aspects of the workplace education initiative do workers and management agree/disagree on?

Think about what you want to find out through the ONA. What are some key phrases that could be incorporated into your goal statement that represent the commonalities in these interests in a respectful way?

Chapter 2: Planning the ONA

Worksheet 3: Participants, methods of collecting information, questions for the ONA, and developing a communication strategy

Questions for you to consider:

What groups (departments, job positions) should you include in your ONA?

Given your understanding of whom you want to participate in the ONA and your ONA goal(s), what method or combination of methods would you recommend?

Now it is your turn to develop some sample questions. Develop them so they are open-ended by using words like what, how, why, when and who. Avoid overusing questions where people just have to answer yes or no.

Given what you know about your workplace, what would be the best ways to communicate with people about the ONA?

Chapter 4: Writing the ONA Report and Presenting the Findings to Key Stakeholders

Worksheet 4: Making recommendations

Consider the following:

The summary that follows represents a finding from the ONA. Write down what your interpretation is and what your recommendation would be?

81% of participants identified upgrading of basic computer skills as a need. 92% of hourly workers and 100% of supervisors identified a need for learning basic computer skills for themselves or others. The participants' greatest motivation to upgrade these skills came from a desire to keep up with changing technology.

People want to be able to help their kids, use the computer for needs at home, help their co-workers and get other jobs where computer skills are important. Some managers see a need for increased computer skills for employees because there will be more computers at work in the future. Moreover, even if a person doesn't work with computers directly, they will have to interface with them in some way.

Interpretation:

Recommendation:
