"Building Our Capacity:

A Workplace Literacy Coordination Model"

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ISBN # 0-9681572-7-0

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Workplace Literacy Coordination Pilot

September 2001

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Acknowledgements:

This project was made possible through the support of the Literacy and Basic Skills Unit, Ontario Ministry of Training, Colleges and Universities (MTCU).

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Many people have given great advice and supported this project throughout the various stages of development. We wish to extend our appreciation to those who donated their time and relentless effort into making this project a success.

THANKS TO:

- Sande Minke, LBS Section, Ministry of Training Colleges and Universities
- Cindy Davidson, QUILL Network
- Veronica Chesney, HumanResourcesDevelopment Canada
- Robert Dupuis, LBS Section, Ministry of Training Colleges and Universities
- Dan Onick, United Food & Commercial Workers Union
- Lana Faessler, Laubach Literacy Ontario
- Victor Carrozzino, United Food & Commercial Workers Union, Canadian Grocery Producers CounciI
- Kathryn Cooper, Guelph Food Technology Centre
- Sue Folinsbee, TriEn Communications
- Carol Leelock, Trainer
- David Thomas and Carol Simpson, Waterloo-Wellington Training and Adjustment Board
- Lorri Sauve, Waterloo Catholic District School Board

THANKS TO THE MEMBERS OF THE REFERENCEGROUP:

- Mary Adamson, Waterloo Region District School Board
- Janet Dunlea, Canadian Hearing Society
- Lindsay Kennedy, Wellington County Learning Centre
- Gina PagliaroIi, Waterloo Catholic District School Board
- Heidi Schulz, The Literacy Group of Waterloo Region
- Murray Shannon, Wellington Centre for Continuing Education
- Bob McIver, Conestoga College
- Anne Moore, Action Read

How to use this report

This manual has a simple layout dividing everything into sections. Following the page (page 10) entitled "What Is Each Section About?" will allow the reader to focus on the areas of the importance to them. It is strongly suggested to take the time to review the entire manual, to understand the project from beginning to end.

The last section of the manual contains Appendices referred to throughout the manual. It was felt that placing them at the end would make the manual less cumbersome. If you would like a copy of any of the PowerPoint presentations found in the appendices, just e-mail your request to Project READ at pro jread@golden.net.

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Project Overview

The goal of this project was to create a template or model for other networks and literacy providers to set-up their own coordination process of workplace education services within their regions. The following is what we accomplished.

OBJECTIVES:

a) PROTOCOLS:

- Established reference committee from all area literacy providers, similar to the Literacy Community Planning Process or Literacy Service Planning groups (LSP)

- Established new group dynamics and relationships, as some providers had different representatives from the LSP's

- Established clear marketing goals and objectives for the group. This included:

    1. Gathering of current workplace training provided
    2. Identification of area of expertise or niche of each provider
    3. Who wished to provide basic skills education for the workplace and who wished to provide basic skills education for the workforce
    4. Established what the network's role would be: coordination, Organizational Needs Assessments (DNA), evaluation, referrals, etc.
    5. Identification of Industry Sector focus. What industries were identified in local board's environmental scans as requiring basic skills upgrading?
    6. Identification of fee ranges for training

- Established performance indicators. Quality control is essential to the success of coordination of workplace training and these standards are the basis used to evaluate and maintain quality.

b) MARKETING:

- Established the marketing plan and strategies. This included creating the packages that would be used in marketing. It required finding area champions, meaning businesses where providers have already had successful workplace programs running and receiving letters' of reference. This can also include businesses that have utilized clear writing services.

c) TRAINING:

- Some providers were ready to take on workplace basic skills training immediately, others required further training themselves.

- ONA's. Once we had decided who would be doing the aNA's (network or providers), training was required on this form of assessment which differs greatly from the individual needs assessments currently done within LBS programs.

- Contracts and Proposals. This training ensured all providers knew what was required within a proposal to cover their costs (program development, assessments, training and evaluation). Ensured all providers knew what was required within a contract to formalize the business contract they would make.

- Setting up a workplace education program. Training was required on the process to set-up a program once the aNA had been completed and results shared.

d) EVALUATION:

- The reference committee needed to approve the evaluation process. This was to establish:
    1. Who will provide the evaluation?
    2. What will be evaluated?
    3. What will the evaluation look like?
    4. Who will receive the results of the evaluation?
    5. What will be done with the results of the evaluation?

The evaluation is the only tool that could be used to ensure the training was meeting the core set of standards developed by the committee.

Background

Prior to this project, PRLNworked closely with the Waterloo-Wellington Training and Adjustment Board (WWTAB) to address the literacy needs uncovered by the board's Environmental Scans. WWTAB completed 3 Environmental Scans (E-Scans) for Waterloo Regionand Wellington County:

- 1st E-scan: focused on literacy and basic skills needs in 4 industry sectors.
- 2nd E-scan: found there were literacy and basic skills issues focusing on health and safety within the grocery producers and automotive parts and related manufacturi ng.
- 3rd E-scan: sought out more specific information on the literacy and basic skills needs based on the recommendations of the 2nd E-scan.

The result of the 3rd E-scan was the identification of 3 sectors that would benefit from literacy upgrading. They are as follows:

A. Grocery Producers
B. Automotive Parts and Related Manufacturing
C. Agriculture and related fields

INITIAL REFERENCECOMMITTEE:

WWTAB approached Project READ about addressing the identified literacy needs in the Grocery Producers sector. The Local Board facilitated a series of meetings between literacy agencies and grocery producers as well as an action plan to address the sector's basic skills needs. Project READ, area literacy providers (college, school board and community-based), United Food and Commercial Workers Union, Canadian Grocery Producers Council and local grocery producers attended the meetings.

Based on the E-Scans and the meetings with the grocery producers, Project READ applied for funding to develop a model of Workplace Literacy Coordination.

Project Purpose Goals and Objectives

PURPOSE:

- Literacy agencies in Waterloo-Wellington wanted to address the gap between workplace literacy needs, delivery capacity and potential opportunities.

- Building on a long history of partnership and strong literacy service planning, agencies were ready to embark on developing a strategic plan to reach employers, employees, and organized labour groups in our region. With evidence from literacy surveys (IALS), published by Statistics Canada and environmental scans by Waterloo-Wellington Training and Adjustment Board (WWTAB), we recognize unaddressed, employment related literacy issues in our community.

- We wanted this pilot to be both a capacity building exercise for literacy agencies and a coordinated effort to reach key workplace stakeholders.

GOALS:

1) To develop an effective and strategic marketing plan to reach targeted workplace sectors in our region in an attempt to increase accessibility of management and workers to services. This includes:
   - identifying appropriate strategies;
   - setting tangible outcomes and outputs;
   - developing appropriate materials to provide employers and employees with information regarding the most efficient pathways to both workplace and community literacy programs.

2) To work collaboratively with literacy delivery agencies to develop a protocol to deal with identified workplace needs and to develop agency capacity to meet those needs effectively and efficiently.

3) To consult with key workplace stakeholders (i.e.: labour, employers, Waterloo- Wellington Training and Adjustment Board, HRDC among others) and target three industry sectors to distribute the protocol materials (Two sectors have been identified by WWTAB - Auto Parts and Grocery Producers).

Objectives:

1) Develop, in consultation with area literacy providers, a written protocol or flowchart of potential pathways that employers and employees can follow to access either workplace (on-site) or community (off-site) literacy programs to increase employment related literacy skills.

2) Facilitate discussions among literacy agencies to define their service niches within the range of workplace literacy and employment-specific literacy programs.

3) Over the course of several meetings, consult with key workplace stakeholders regarding targeting three industry sectors, discussing the best strategies to approach the individual employers within the sectors, and to make contributions to the written protocol or flowchart.

4) Develop and publish protocol materials specifically targeted at employers and employees, and labour unions to inform them of how to identify workplace literacy issues and/or access workplace or community literacy programs - potential pathways.

5) Develop and implement an effective plan of distribution of protocol materials to individual workplaces and unions within the three targeted sectors.

6) Develop an evaluation plan and evaluative tools to assess our written protocol, distribution plan, and materials by gathering feedback from employers, employees and labour representatives.

7) Publish materials and protocol in a final report and distribute it to networks and other groups across the province and/or Canada

What Each Section Is about

This report is divided into 7 sections plus appendices. You can read each in sequence or turn to the section which most suits your current local situation and needs. This is a template of an action plan to develop a local model of coordination. Take it as a whole or in parts. Good Luck!!!

SECTION 1 - Workplace Planning Process
This section discusses the Workplace Planning Process. It includes the set up of planning process, information gathering and sharing, training for the providers and evaluations. Sample questions and processes follow each topic of discussion. Detailed questionnaires and some training handouts are in Appendix One, Two, Three and Five.

SECTION 2 - Marketing
This section includes the marketing strategy with many easy-to-use examples. A full copy of the marketing materials is included in Appendix Four.

SECTION 3 - Evaluation of Process
Included is an evaluation of the process we used to gather information as well as an evaluation of the project.

SECTION 4 - Field Test with QUILL Network
This highlights the results of our initial field test of setting protocols within another network that includes a rural perspective. PowerPoint presentation with notes is included in Appendix 6.

SECTION 5 - Recommendations, Challenges and Accomplishments
This section compiles the recommendations we have gathered based on the experience of this project in our region.

SECTION 6 - Financial Requirements
MTCU requested that our project make a recommendation of the financial impact of hiring a marketing person for workplace literacy.

SECTION 7 - Resources and Bibliography
This section includes all of the resources used with a brief description where appropriate.

APPENDICES - Tools for You
This section is divided into six areas.

- Appendix One contains a list of questions we asked all literacy providers in Waterloo-Wellington to understand the extent of their knowledge/experience in regards to workplace/workforce literacy.

- Appendix Two contains questions used for an Organizational Needs Assessment or ONA (this is an assessment of literacy and basic skills needs within a workplace environment). It also contains an observation checklist for the assessor.

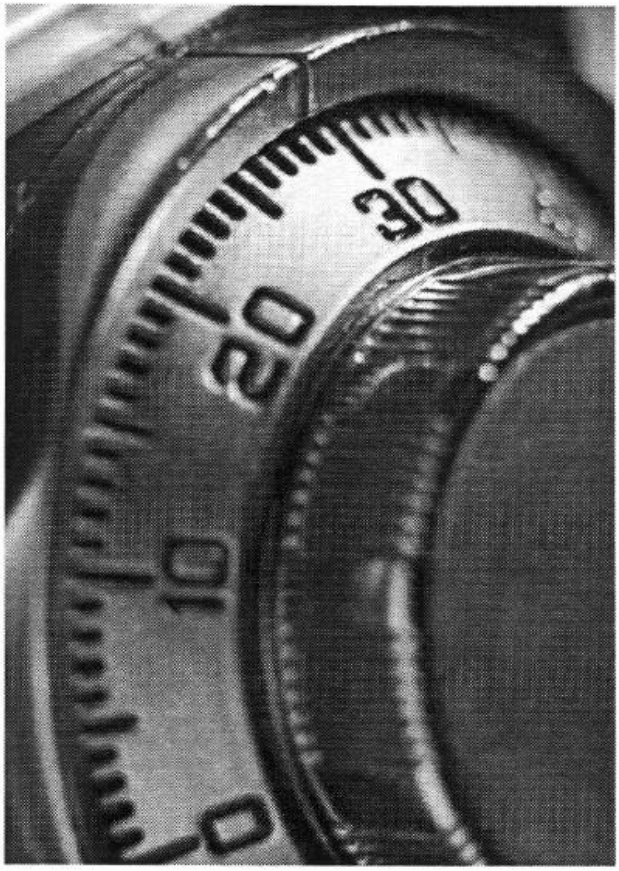
- Appendix Three contains various key handouts obtained during the Administrative and Practitioner Training days. It includes "Making a Presentation on Your Services", "Developing Contracts", "The Componentsof the Training/Individual Needs Assessment", "PlanningFor Program Delivery", "The Role of the Workplace Educator", and a "Workplace Materials Checklist".

- Appendix Four contains copies of the marketing materials we developed. It also contains samples of marketing phone scripts, a cover letter and a PowerPoint presentation for marketing.

- Appendix Five contains sample proposals and contracts for workplace training.

- Appendix Six contains the PowerPoint presentation we delivered to the QUILL Network to orient their members to workplace/workforce literacy and coordination.

SECTION 1



Workplace Planning Process

The following are the steps we suggest taking in the planning process.

A. SET-UP PROCESS
1. Key Players
2. Pre-Marketing Checklist

B. AWARENESS OF GROUP DYNAMICS AND DEVELOPING A TRUSTING ENVIRONMENT

C. INFORMATION GATHERING AND SHARING

D. DETERMINING NICHES

E. TRAINING FOR DELIVERY AGENCIES
It is important to establish the training needs and address these needs as soon as possible.
1. OVERVIEW OF WORKPLACE EDUCATION
2. ORGANIZATIONAL NEEDS ASSESSMENTS
3. Part One - MARKETING AND CONTRACTS FOR ADMINISTRATORS and Part Two - DEVELOPING WORKPLACE/WORKFORCE TRAINING FOR PRACTITIONERS

Set Up
Key Players

In order to be successful with your Workplace Planning, The network must have the right players at the table from the beginning. Your setup may look something like this:

GROUP ONE - LITERACY PROVIDERS - WHO SHOULD BE THERE?

[You may have two groups (see next page for description of "Group Two") to consult with or you may combine them depending on the size of your region].

It is key to have a workplace education representative or interested staff person from each sector and/or community within your network region. You should have at least one rep from:

- Community College(s)
- School board (public and separate)
- Community Based program(s)

Before you meet with this group, send out the following "pre-thinking" questions to get them thinking about workplace education:

1) What do you think workplace education is or what do you think workplace education should be?

2) What does workplace education mean to you and your organization?

3) What do you do really well in your organization (i.e.: what is your service niche)?

4) What do you think your role would be in providing workplace education?

5) What role do you see the network having with respect to workplace education?

6) Do you think all providers should offer workplace education?

7) Do you think that a fee should be charged for providing workplace education?

8) If you already have some workplace education experience, could you share it with the other providers? Why or why not?

HELPFUL HINTS ...

- Coming to consensus on these questions may take several meetings but it is vital before moving forward.
- Make sure all of your providers are in agreement before you start to meet with Group Two: Other Key Stakeholders!

GROUPTWO - OTHER KEY STAKEHOLDERS - WHO SHOULD BE THERE?

- Local Training and Adjustment Board
- Chamber of Commerce
- Rotary Club or other interested service clubs
- Rep from each industry sector to be targeted (i.e.: auto parts, manufacturing, textiles etc.)
- Other interested parties (i.e. HRDC,Apprenticeship Section, etc.)
-
- HELPFUL HINTS ...
- These stakeholders may want to be involved in all Group One meetings or just consulted as needed.
- These reps can provide valuable perspectives on workplace training.

  -how to sell it?
  -is it needed?
  -how is it perceived by the industry sector?

Group Dynamics

CONSIDER ...

The representative that is on the Literacy Community Planning Committee (LCPP) may not be the correct person to be on the workplace planning committee. In larger organizations the LBS Coordinator or Administrator is different from the Workplace Training Coordinator.
If this is the case, ask the LCPP rep to bring the Workplace rep with them to the first meeting or Group One, in order to make introductions.

REMEMBER...

Since the players may not know each other, take the time at the first few meetings to allow people to get to know each other and start to establish a level of trust. Trust and mutual respect are the keys to cooperation and planning.

Try These Ideas ...

- Share something unique about yourself with the group.
- Ask the group to partner up. Give one partner a simple picture. With their backs turned to each other, have the person with the drawing give specific details on how to draw the picture to their partner (the partner cannot see the picture), then share the results. This is a game in how to communicate effectively.
- Play brain twister games (e.g. balderdash, word puzzles, etc.). This will start the group meeting by "thinking outside of the box".

Set Up Process

* At the first meeting provide the following information to literacy providers:

- Distribute a tentative timeline of the goals and objectives of your process and what information you will need from them.
- Most providers want to know "up front" the level of time commitment necessary so they can assign staff accordingly.
- Providers should begin to talk to you about how they see the role of the network in workplace education programs.

* Receive the following from literacy providers:

- Since there is a lot of up front work, suggest reasonable deadlines for the information to be received from the literacy providers (e.g. a two week response time to questionnaires).

Based On Our Experience ...

It was helpful for us to receive information early on, since it allowed the following:

- We were able to find out which literacy agencies had programs in place to provide workplace education right away.
- Who needed more time, support and training before they were comfortable being included in the marketing strategy.

HELPFUL HINT ...

- Make sure the literacy providers are aware of what is expected from them from the beginning.

Pre-Marketing Checklist

The following checklist contains key issues that the network and literacy agencies must think about before starting to market workplace education.

HELPFUL HINTS ...

- It will be very beneficial if the network can say check yes to most of these questions!
- Be prepared for the questions you may be asked BEFORE you are asked them!

Total buy in and support

- Are all providers supportive of the concept of workplace education?
- Do you have support of a few key local businesses to be "champions" for workplace education?

Agreement to support the network marketing workplace education services offered by all key stakeholders from the network level

- Are all provider and network boards of directors supportive of workplace education?
- Is the MTCU - LBS Field Consultant available for any questions you have?

Support from the local board and their role

- Is your local training board willing to be involved? (i.e.: host breakfast meetings, introduce you to key contacts etc.)

Clear definition of the role of the network

- Think about the role the network plays.
- Review the 7 core functions of a network in a workplace context.

Providers agree to follow a general "Statements of Good Practice" for providing workplace education

- What are standards that each literacy provider is willing to follow for their own organization?

'Providers' agreement to participate in standardized evaluations

- Since the network is marketing the services, it is important to evaluate all programs the same way to maintain credibility.
- Providers and the network create the evaluation tool and the networkadministers it.

Fee schedules or fee ranges of the cost to provide workplace programs

- Since the network is marketing the services, are you able to provide information on the range of fees charged by the literacy providers?

Determination of service niche

- Before the network markets, each provider must identify their distinct service niche? (One provider cannot do everything) (Also refer to Page26 "Determining Niches". E.g. community-based agencies excel in 1:1and small group (2 to 6) delivery).

'Willingness to partner with other literacy providers

- Will literacy providers agree to subcontract with each other when necessary in order to provide the best service possible?

'Willingness to share resources

- Will providers share workplace resources with each other? (Either paid or for free)

'Winter or Spring start date for marketing campaign

- Determine the best time to market based on the companiesin your region (ex: summer may be when plants shut down).

Based On Our Experience ...

We needed to ask ourselves, " *What do companies want/need to know about the literacy providers that the network is marketing?'* If the following information is not present somewhere in the marketing materials, it needs to be included.

We also asked the providers *'If someone came to you unsolicited, and wanted to sell you something, what would you want to know?"*

Who is this person?
Why are they here?
Who do they represent?
Cost?
Benefits of product/services?
Why do they think we need it?
Reputation/ credentials of businesses?
What support can they give us (the employer)?
Potential outcomes/measurement?
Timelines?
Do I trust the salesperson?
Service guarantee(s)?
When can they deliver?
Is the price negotiable?
Is their price/service comparable?
Where can I get more info?

Information Gathering and Sharing

Information is gathered by the network from each literacy agency interested in participating in workplace education. This information is then shared by agencies at the Group One meetings.

A marketing tool is developed in the form of a workplace education directory. In order to create a workplace education directory, each provider must share information with the group. The purpose is to gather information that the providers may have already discovered in their experiences, and reduce duplication of effort, time and resources.

HELPFUL HINTS ...

- Send out a preparatory list of questions to gather background information about workplace education from your providers before you meet with them.
- Allow approximately 2 weeks for your providers to send the information back to you.
- It is key to have support from the union when providing workplace education in a unionized environment

EXAMPLES OF QUESTIONS FOR LITERACY PROVIDERS...
To be distributed at the first meeting to prepare for the second meeting.

The following is adapted from Workplace Education Activities in Sask. An Overview. Funded by NLS and HRDC January 96 (some modifications to questions 1,2,38,39)

EXTENT AND TYPES OF WORKPLACE EDUCATION ACTIVITIES PROVIDED.

1. Do you offer workplace education programs? If yes, what LBS level are they?

2. If you are not offering workplace programs now, have you offered them in the past and what LBS level were they?

3. Do you offer upgrading programs?

For the complete list of questions, look in: "TOOLS FOR YOU", "Questions to ask Literacy Providers", "Appendix I" Page71.

BASED ON OUR EXPERIENCE...

A timeline is an essential tool that:

- helps remember logical order of agreement.
- helps discover literacy agencies' service niche.
- serves as a guide to help you move on to the next step.

TRY THESE IDEAS ...

- The main topics covered at the initial meetings are listed below.
- Each provider received the following questions based on our timelines with instructions to complete each question on how it applies to their organization.
- Each item had to be agreed upon or decided against as a group over a series of meetings.

* Role of Network:

- Who makes referrals from workplace contacts to the providers?- the network or should all providers be responsible?
- Will the network do the needs assessment on behalf of all literacy providers or will the network do the needs assessments for agencies that do not have the capacity to do them at this time?
- How involved will the network get in negotiating workplace contracts?

* Needs Assessments and fees:

- Will the provider who is doing the contract do the needs assessment?
- Should there be some form of "standard" when doing needs assessments in the case of different providers doing needs assessments? (Quality and consistency issue)
- If going into a unionized environment and dealing with unions who have experience doing needs assessments, will providers be willing to let the union do that aspect of the workplace program? (e.g.: the Grocery Producers Council does needs assessments.)
- Will providers offer programming on or off site or both?
- Is the entire fee paid at the end of implementation?
- Is the needs assessment paid for first and the rest paid at the completion of the program? Or should it be a *70/30* or other suggested split?
- Will there be a fee schedule for a needs assessment based on size of company (i.e.: small - 0-50 employees, medium - 51-149 employees, large - 150 + employees)?
- Will all literacy providers agree to the same fee schedule for a needs assessment?
- Will there be a range in fees for the instructor? Will these be the same for each provider?
- Will the fee be an hourly rate or a per program rate?
- Will these be the same for each provider?
- Will GST and PST be added to the fee?
- Will your agency agree to give your fees to the network for marketing purposes?

Customization:

- Will each program be customized using materials in that particular workplace?
- Is everyone willing to do customizing as necessary and not use pre-existing formats, unless appropriate?
- What is the approximate time to setup program based on customization (time will vary depending on needs of company)?

Evaluation:

- Will agencies agree to provide the network with contact nameof company, teacher name, time of program etc. *(This could be beneficial to providers as it should be looked at as an outside source coming in and doing a FREE consultation/evaluation of the program that was provided. The results would be given only to the provider and since it is not done by someone at that organization, it is very objective.)*

Services:

- Who wants to have their workplace services marketed by the network?
- Who wants more time to set up programming, but will join later?
- Who wants professional development on workplace literacy?
- What topics would be of interest?
- Will companies already doing workplace literacy be willing to share resources and expertise to other literacy organizations?
- Provide contact name and number of person in charge of workplace program at your agency and best time to contact him/her.
- Fee schedule or fee range (based on agreements)
- Niche of service (no one can do it all!)
- Will you be willing to partner or subcontract and who would you do that with - specific organizations only or whoever is best suited to fill that need?
- Who is going to do what?
    - Who is going to offer 1-1 tutoring in the workplace
    - Who is going to do small group - 2-8 students
    - Who is going to do large group/classroom (10+ students)
    - Who will be doing low level 1
    - Who will do high level 1 to low level 2
    - Who will do high level 2 to low level 3
    - Who will do high level 3-5 (the company does not need to know levels, but the networks and literacy providers do)
- How long will it take (on average) to go from needs assessment to implementation and evaluation of workplace program (based on small, medium and large size company- 6 months to one year etc.)?
- When will programs be offered? (i.e.: Monday to Friday, Mornings, Afternoons, Evenings, Saturday and Sunday, All year, By semester or term, No services in summer (July - August), Shift schedules (i.e.: early morning or midnight shifts etc.)

Recognition:

- Will there be anything in place for employees who complete a workplace literacy course/program? (tangible) (For example, someone completing a high school or college course may get a certificate.)
- What will the employer accept as demonstration of learning?

Certification:

- Will they get a certificate of completion through the provider or the network?
- Should the employees get anything at all?
- Should something be given based on the completion of course or based on x number of hours completed?
- Should the company who is paying for the workplace do the recognition?

Marketing:

- How to contact employers? (Mass mailing, target mailing, follow up call etc, general breakfast meeting, 1-1 meeting)
- How many employers to contact? *(Need a number to be able to measure success at end of project)*
- Number of contracts to be established for the program by the end of the year
- Names of companies to contact *(some company names were given in the workplace survey, but providers need to give the "ok" to contact them and contact names if possible - we don't want to "push in" on existing contracts/contact)*

Determining Niches

WHAT IS A SERVICE NICHE?

A service niche is the type of service that an agency excels in providing.

Basically, you have defined your niche when you can answer:

- WHO is my target audience or group (be specific)?
- WHAT is my purpose?
- WHERE will the tutorials or training take place?
- WHEN will the tutorials or training take place?
- HOW is my program unique from the others provided?
- HOW will the target audience or group be instructed?

HELPFUL HINTS ...

- One provider cannot offer everything! (Unless you are in a small or rural community).
- All providers must agree with each other's niches and respect them.
- In order to provide high quality workplace education programs, all providers must agree to customize programs for the needs of each individual company.

Training for Delivery Agencies
#1 – Overview of Workplace Education

Based on our experience we found that training is essential for the success of workplace education. The literacy providers will most likely have varying levels of experience with workplace education. The providers identified the need for workplace literacy training in order to build their capacity to deliver services.

It is important for the providers of workplace programs to **become comfortable** with workplace education and making sure everyone is on the "**same page**" and speaking the "**same language**".

The group identified the need for an introduction to Workplace Education for their first training session. While it is not necessary to go into detail, it is important to give a **general overview** of what is involved in workplace education.

REMEMBER...

- your first training session will set the tone for the rest of the sessions as well as the view towards Workplace Education.

- a trainer with practical experience with workplace education is essential to successful training sessions.

YOUR "OVERVIEW OF WORKPLACE EDUCATION" SHOULD COVER...

- What Workplace Education Means to Each Literacy Provider
- Similarities and Differences Between Workplace Education and the Community Programs
- Program and Curriculum Development
- Benefits of Workplace Education
- Myths of Workplace Education

Based On Our Experience ...

An outside trainer with a workplace education background was necessary for bringing the providers to the same level of knowledge. We were fortunate to have Sue Folinsbee of Tri En Communications to provide all three of our training sessions.

Training for Delivery Agencies
#2 – Organizational Needs Assessment

At the first training session providers identified the need for training about Organizational Needs Assessment (ONA).

It is beneficial to offer this after you have already determined the niches of the providers. (**See "Determining Niches", page 29, which outlines the process to follow**)

This will ensure that the providers are clear on what they offer and the ONA will become more efficient and effective.

Once the needs assessment is completed and a provider is chosen, the provider will meet with each worker individually and determine the individual needs.

HELPFUL HINTS ...

- All providers must understand the purpose of the Organizational Needs Assessment (ONA) and the provider's role within it.
- An ONA can take anywhere from 2 hours to 6 months depending on the needs of the company.
- Any information you can get before you do an ONA will be helpful in making your recommendations.

ADVANTAGES OF THE NETWORK COMPLETING THE ONA ...

- Inform the company about all aspects of what a good workplace education program contains
- Determine if the company has a workplace, literacy-specific education need
- Determine which provider will be able to best suit the needs of the company
- Save time and effort of providers and provider neutral source of information to workplace

OUTLINE OF AN ORGANIZATIONAL NEEDS ASSESSMENT ...

The following is adapted from "Needs Assessment in Workplace Education': Dale C Brandenburg, Ph.D. and Rita C Richey, Ph. D., Wayne State University, 1998

Sample job descriptions - should include degree of difficulty, required skills and resources, the level of literacy skills needed to do the job.

Employee Descriptions - general literacy levels, idea of who the participants will be (i.e.: cultures, educational levels, training experience, work experience, literacy level, attitudes about training, past interest in being involved in training (literacy and/or language).

Instructional Environment Descriptions - any existing language or literacy instructional programs, inventory of available instructional materials, inventory of available instructional equipment, description of existing instructional facilities and other types of instructional support available.

Organizational Climate Descriptions - overview of existing organizational climate, the existing incentives for literacy in each organization/department, description of the problems within the organization that are affected by literacy/language, what has been the impact of new technology in the workplace, what are other anticipated training needs of the company, what would facilitate or impede the transfer of literacy training.

SAMPLE QUESTIONS FOR AN ONA. ..

The remainder of the questions can be found in "Tools for You': "ONA Sample Questions to Ask Employees': "Appendix 2': *Page 75.*

Examples of Questions to ask Employees:

1. What is your job title?

2. What shift do you work (circle one)?
   Days Afternoons Midnights Split shifts

3. How many years have you been working at this job?

Training for Delivery Agencies
#3 –Administrative & Practitioners

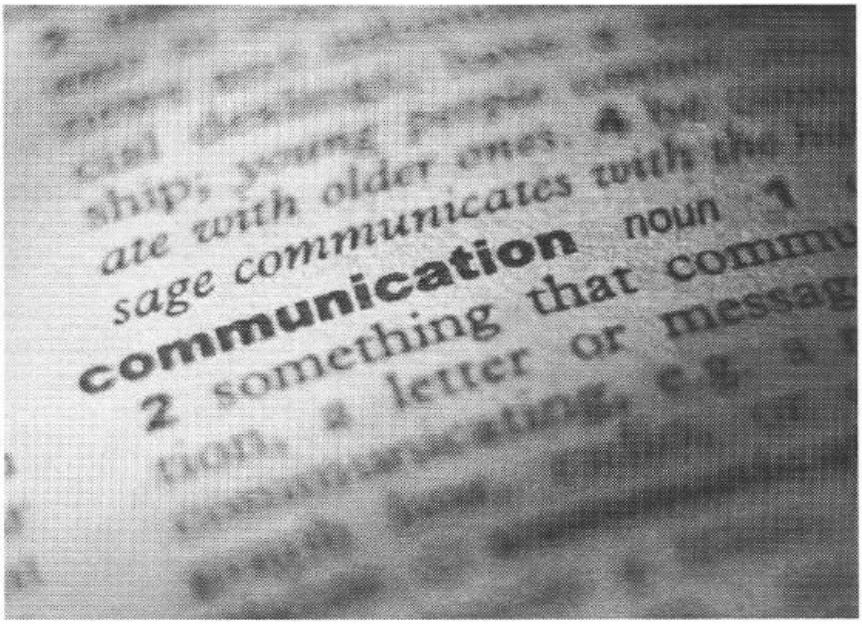
The final training we had for our providers was divided into administrative topics and practitioner or instructor topics. Once again the need for this training was identified as a result of the second training.

In the morning we covered the following:
Administrative:
• presenting to companies - marketing your services
• developing contracts and proposals

The afternoon training was for practitioners:
• overview of workplace education process
• role of the instructor
• taking what they already know how to do and adapting it for workplace needs

See Appendix 3, Pages 89 - 98 for samples from the training

Section 2


communication noun
2 something that commu
letter or messag

Marketing Plan/ Strategy

MARKETING PLAN:

The key to marketing workplace education is to develop a targeted and comprehensive plan. The important thing in a marketing plan is to answer all the questions of: who, what, where, when, why and how. The plan is a step by step process and requires a variety of steps to be completed.

1. **Who can you and will you contact?**
   - Manufacturers in Waterloo Region and Wellington County
   - Make a list of all manufacturers within the region
   - Develop a "hot contact" and "cold contact" list.

     • "hot contacts" are when you have a direct connection to the person in charge of training within a company or someone within an executive level.
     • "cold contacts" are when you either cold-call or go to a company and endeavor to find out who the appropriate person is in charge of training.

   - The launch. Create media releases (and lists of everyone it will be sent to media, politicians, lawyers, everyone who has influence), public service announcements (PSA), contacting newspaper business editors, make appointments on talk radio shows and book appropriate trade shows.

2. **What are you selling?**
   - For a literacy network we are selling the ONA and the training capabilities of our membership. literacy and basic skills are being sold in a "how do they relate" approach to the company. It is our job to convince a company that an ONA will provide them with an overview of potential training needs their employees require and potential clear writing issues within a variety of their documents.

3. **Where are you selling it?**
   - Training
     - This can be done on-site if the company has the room and that is the desired site from all participants.
     - This can be done off-site at one of the providers' sites or at an alternate site (if available).
     - The ONA will be done on-site with participation from a variety of individuals within the company. It is important to see how the company communicates in their environment.

4. **When will everything occur?**

- The ONA will take place at a time most convenient to the company. Within 3 - 5 days of the completion of an ONA, the training coordinator at the company will receive a summary of the findings of the ONA with recommendations on the training and/or clear writing needs. The recommended provider(s) will also receive a copy of the ONA at this time.

- When a company decides to contract for training, the network workplace coordinator will ensure the contact between the provider and the company, unless otherwise specified by the company. Within 3 to 5 days of this contact, the network workplace coordinator will contact the provider as a follow-up. In some cases, the company may wish more than one provider to bid on the training and this will also require deadlines and follow-up by the workplace coordinator.

- The length of time between the provider contacting the company and the actual training occurring will vary on many factors:
    - The type of training and how many employees in the company will be involved.
    - The completion of in-depth, individualized assessments.
    - The setting up of the site for training.
    - The pre-preparation to training, i.e. curriculum development, the hiring of a facilitator.
    - The length of training required and the time constraints for number of classes per week.

5. **Why do they need training?**

- This is where the promotional and marketing materials will answer their questions. The network workplace coordinator must know these benefits and facts "inside and out".

- It is also important, if possible, to have a PowerPoint presentation available and a laptop when meeting with the company's training coordinator or human resources manager.

- Benefits to the company must be shown...how will they save money?; how will this improve production?; Is it advantageous to ISO and QS within the company?;How will their consumers benefit?

6. How will everything be done? This is your marketing strategy.

- Part of the strategy is also to create a budget and success ratios. The budget will include:
    - Paper costs (envelopes, cover letters, marketing materials and folder)
    - Postage
    - Long distance charges
    - Time
        - To put the packages together and mail them
        - To do the original and follow-up calls

MARKETING STRATEGY:

1. **Development of Marketing Materials**
   - Cover letters
   - Brochures
   - Fact sheets
   - Newspaper articles
   - Letters of reference
   - Useful statistics
   - Make it all professional through a desktop publisher and create a presentation folder
   - PowerPoint Presentation

2. Creation of your contact list
   - Hot Contact List:
     - Contacts through your local board
     - Contacts already made through your providers
     - Personal contacts
     - Contacts made through networking: Chambers of Commerce, Rotary Clubs, Trade Shows

   - Cold Contact List:
     - Manufacturers within the geographic region you cover research them through the internet and local business directories at the libraries.
     - It is easier to make these contacts once you have a contract in place, as you can market to similar companies within the region.

3. **Making contact**. Remember that once contact has been made, companies and individuals prefer to have one-point of contact and that is the role the network will play.

   - Hot contacts will be much easier and will follow the process similarly after a cold contact has been made into an appointment.
     - The only issue you may deal with in hot contacts are people who are familiar with the supplemental funding for workplace education in the past. Being prepared isn't just for the boy scouts. A good counteractive measure in this case is to say, "Yes, in the past there were dollars to assist some employers with training, but then you also had the government controlling the training. Now you get to say what you want and need." The selling of the empowerment point is strong

   - Cold contacts. There are four steps to remember with cold contacts and the last three fit with hot contacts also:
     1. Getting the name
     2. Talking to them
     3. Meeting them
     4. The close

- Once you have chosen the company to contact there are is only one person you need to get through to reach the training coordinator or Human Resources Manager or person in charge of employee training and that is the front office person or receptionist. It is this person's job to screen people like you out and to not allow the "training coordinator" to be bothered with regular solicitation.

- Using a phone script (see Appendix Four, Pages 112 - 115) is good, it will help you through the difficult moments. The script should include that you are a non-profit organization with a history in training and a bit about your services. Then the inquiry into whom in the company is the person you should be talking to. Ask if they are available (usually not), ask when it would be best to call them and make sure you have the receptionist's name and the name and title of the person in charge of training.

- The follow-up call should be made within the time you were told or 3 days if no time was given. Use the receptionist's first name and ask to speak to the training coordinator (using their first name, too). Familiarity of using the first names will give you a better chance of getting through.

- You are through to the training coordinator (hot contact or cold contact). After giving your brief sales pitch again, offer to send out an information package to them. If they agree, then tell them you will call again after they have received the package to discuss this great opportunity further. This is the point where you have to decide if the contact is a good or bad one. Were they non-committal or told you "we'll call you" when informed of the follow-up to the package? Trust your instincts, if there wasn't any interest, put it aside. Sending out expensive packages to groups that don't even want to read it is a waste of money and time.

- If the contact feels good, then proceed. Personalize one of the cover letters and put the package together. Handwrite the address and contact's name on the envelope. They receive a multitude of packages and one that's hand-written may have less of a tendency to end up in the garbage than a pre-typed label.

- Three to five days after mailing (know your mailing times within a region) contact the individual again to discuss the package further. Have two potential appointment times ready and ask them if they'd be available for a meeting at either time. Tell them the meeting will not take more than 15 minutes (and make sure it doesn't ...that's the importance of the presentation ...simple and short and to the point).

- Using a PowerPoint presentation with a laptop will assist greatly in your face-to-face meeting. It helps to keep things to the point and allows for visual and tactile stimulation with the auditory speech. Hitting your audience's learning styles is the best way to begin the sell.

- The focus now must be on this particular company's needs...how will they benefit from an DNA? Solid research into the company is key to explain the benefits. Ensure that your

marketing materials also have simple questions that a training coordinator can answer to see the internal need themselves.

- **Always use close-ended questions which will result in yes or no answers. Get them in a momentum of saying YES! This goes for phone contact or face to face.**

  - Blind Mailing.
    - ☑ This can be done, but it's not recommended for its results. The costs can be overwhelming for the actual results you get.
    - ☑ It's also not effective to just wait after advertising ...that's not enough to be successful.

4. **The closing.**
   - Always ensure you have an DNA contract ready for the company you are seeing. Chances are you won't close the deal there, but you can at least hand them the contract for your follow-up.

   - Ask them if they can see the value of having an DNA. If not, you still have more selling to do...if yes, then ask them if they need more time to review the materials and contract again or if they would like to set up a time for the DNA to take place.

   - Be ready for an eventuality. Have ready dates at hand in case you can close the deal on-site or dates you can use for follow-up to close.

   - Remember the price is the closing and the service is the selling. When someone can see a high-value for a service and the price is very reasonable, it's a much easier close. Be ready with scenarios of training costs and clear writing costs.

   - Don't get discouraged. An excellent closing ratio is if you send out 30 packages and get 1contract.

5. **You've done the DNA, what's next?**
   - Now you have to sell the services of your providers. The DNA summary should be the most important selling point in doing this. They've made the initial investment ...they have the interest ...now it's your job to get the providers in the door. Emphasize their years of experience in training, individualized training plans, outcomes and clear writing. Point to letters of reference (if you have them) or references from training in other regions. Follow the procedures you did to sell the DNA. Keep it positive and close the deal.

   - Don't be discouraged. DNA's do not automatically mean you will get a training contract. Set a realistic closing ratio of training contracts to DNA's.

- ALWAYS, no matter what, ask for a letter of reference from companies who have contracted you to do DNA's and/or training. Have sample reference letters ready for a specific company, as many people do not have the time to compose one themselves, but feel comfortable either signing or editing one written for them.

- ALWAYS, no matter what, ask for referrals from companies who have contracted you to do DNA's and/or training. You can even ask for referrals from companies who do not contract you. A cold contact, can lead into a hot contact.

6. **Evaluation**
   - You need to evaluate the success of your DNA and your training, but what about evaluating where you didn't succeed in getting either? It's worthwhile to ask these contacts why they chose not to use your services, so you can avoid those problems in the future.

7. **Continuing Marketing**
   - Marketing never stops. It's why McDonald's and Ford, for examples, are so successful. Even if Ford lots are empty and there's a 3-month waiting period on any new vehicle, they continue to market their product. Why? Demand. The more you are in demand, the more people want what you have AND the moment you drop out of sight, you ARE out of mind.

8. **Continue to review your budget and ratios**. As time goes on, the costs may drop (packages are easier to put together for example) or the ratios may not be realistic. Realistic goals with realistic budgets will help you to maintain a momentum.

See Appendix Four for samples of the following:
- marketing materials (Pages 99 - 111)
- call scripts (Pages 112 - 115)
- cover letter for marketing package (Page 116)
- PowerPoint Presentation for marketing (Pages 117 - 120)

Budget & Ratios

Workplace Budget and Ratios for Project READ Literacy Network

Budget for mailing 1package:

Product	**Cost**
letter head	$ 0.75
marketing materials	$ 9.55
folder	$ 1.50
envelope	$ 0.75
postage (E)	$ 1.75
time to make initial call (15 minutes)	$ 6.25
time to make initial contact call (10 minutes) $	4.25
time to personalize cover letter (15 minutes)	$ 6.25
time to put package together and mail (10 minutes)	$ 4.25
time to make follow-up call (15 minutes)	$ 6.25
TOTAL	$ 41.55

Time available to market per week is 20 hours. Therefore you only have time to send out approximately 15 packages per week. That's a total budget cost for the packages of $**623.25 per week**.

That's a total cost annually of $32.409.00.

Ten (10) packages per week to start would be $415.50 per week and $21, 606.00 per year.

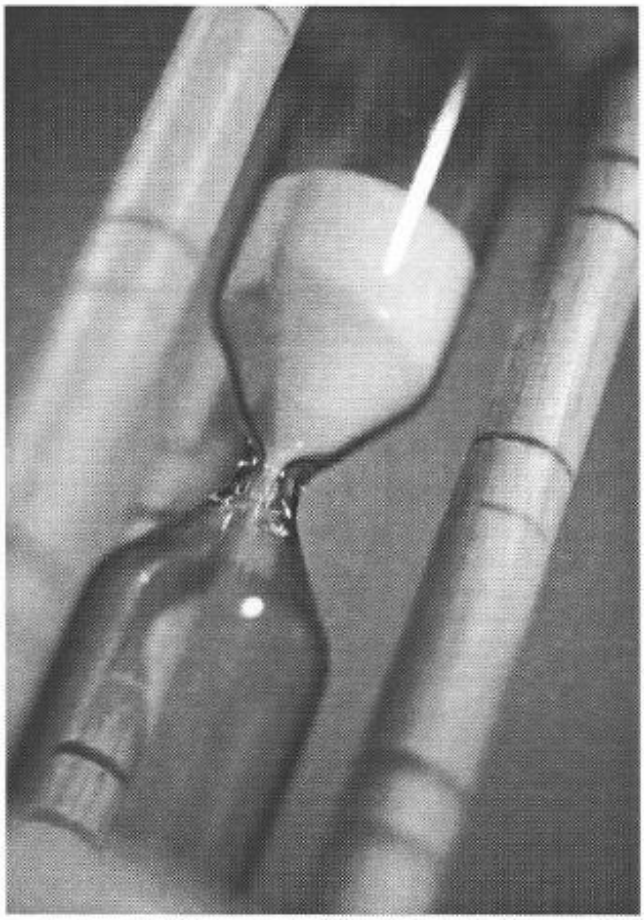
Success Ratios:

- 1appointment to 10 packages is an excellent result, as would be 1ONA to 3 appointments.
- 1 appointment to 20 packages to start
- 1ONA to 6 appointments to start
- **80 packages to 1 ONA as a starting point**

Proposals And Contracts

See Appendix Five, Pages 121 - 130 for samples

Section 3



Evaluation of this Project

Evaluation of any project is essential to help determine how successful the process was, to find out what went well and what could be changed next time.

The following questions were asked of each of the providers who were involved in the project.

3 **Training Sessions**

1. Please give examples of what you are doing differently as a direct result of the workplace training sessions that were offered.

2. What things were you able to implement immediately from the training sessions at your organization?

3. What areas of the training had the most impact/relevance for your organization? How were you able to apply these to fit your organization?

4. What other workplace training would you like to see offered after the completion of this project to prepare for the next phases of workplace education?

5. How has your attitude towards workplace education changed since attending the training sessions? What are the reasons for that?

Information Gathering/Sharing Process (i.e.: meetings to determine niches, review marketing material content, etc.)

1. Do you feel that we had
   Too many *Enough* *Not enough*
   meetings in order to achieve the goals of the project?

2. As a member of the reference group, what do you feel was your greatest contribution(s) to the project? (i.e.: knowledge, experience, presence etc.)

3. As a member of the reference group, please give examples of times you were able to offer constructive criticism to the project.

4. What aspect of the meetings were the most useful for you?
   Information sharing (i.e.: who has contacts, etc)
   Project Updates
   Input for processes and materials (i.e.: marketing materials, flow charts)

Opportunity to express concerns
Opportunity to come up with solutions for concerns

5. When you gave your input at meetings or otherwise, in what ways did you see that it was implemented in the project? (i.e.: changes to agendas, materials etc)

6. What areas (if any) of workplace education do you think that your organization still needs time to develop? (i.e.: developing principals of good practice)

7. What method of information sharing do you feel was most useful for you: Alphaplus, Email, phone calls etc?

8. Were there enough different opportunities to share your ideas? (i.e.: meetings, email, Alpha Plus, phone calls)

General

1. How have you passed the knowledge from this project on to your staff?

2. How will your organization follow the process that you helped develop for companies and employees to access workplace education?

3. Based on the agreements made about LBS levels, what do you have in place to ensure that you do not take on a contract that is outside of your level of expertise?

4. Are you comfortable with your service niche for workplace education? How Will you refer to other agencies if you do not have the capacity to provide what a company needs?

5. Have you experienced an increase in calls from employed workers from companies that have been marketed to for this project?

6. Do you feel the marketing materials you helped create will reach the contacts they are targeted for?

7. Do you feel that the marketing plan was general enough so that it did not limit any company from receiving information about workplace education?

8. In what ways did your organization support/contribute to this project?
   Responded to email requests before timelines
   Participated in Alphaplus discussions
   Offered to be a resource for other providers
   Able to offer meeting space
   Attended meetings consistently
   Sent appropriate people to meetings/training

Communication Process

1. What opportunities were you given for input in the creation of this project before any staff was hired?

2. Do you feel that other key stakeholders were aware of the project and given the opportunity for input? What could have been done differently (if anything)?

3. In what ways did and the project staff keep you up to date and informed about the project as it progressed?

4. When you were asked for your feedback, was it implemented? In what way was this shown?

PROJECT READ'S EVALUATION RESULTS:

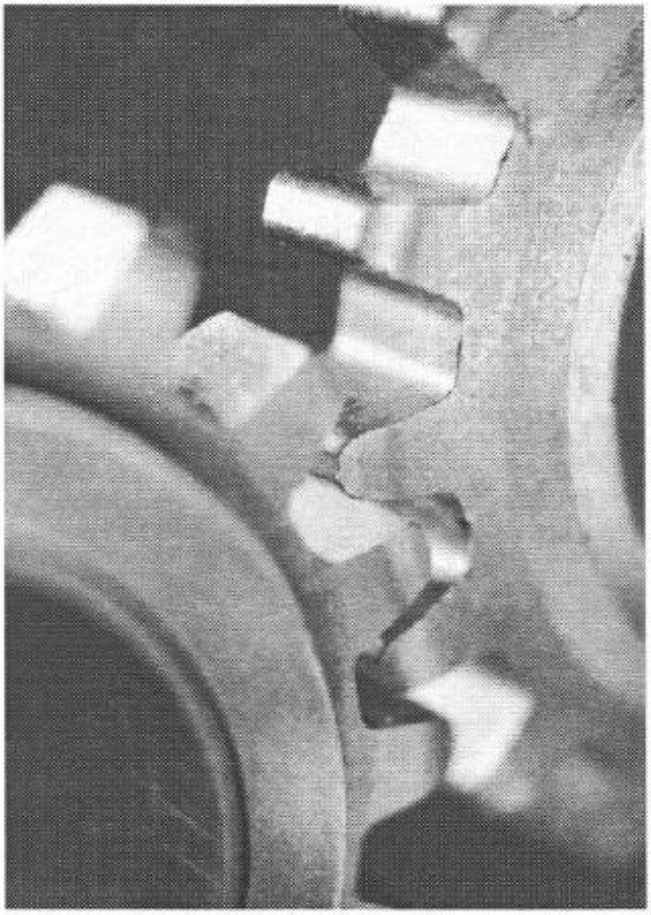
- Training:
  - Delivery agencies that attended the training felt it gave them a better overall knowledge of workplace education.
  - Attendees indicated they understood the difference between workforce and workplace training and how it relates to their current services.
  - General increase in knowledge of marketing and contracts and developing workplace-specific training.
  - Delivery agencies were more willing to participate in workplace education after the training session.

- Information Gathering/Sharing Process:
  - Delivery agencies with more workplace education experience indicated we had too many meetings while agencies new to the experience felt there were enough meetings.
  - The most useful aspect of the meetings was information sharing and input for processes and materials.
  - The best method of information sharing was through phone calls and e-mail, as the Alphaplus discussion was used more as a bulletin board.

- General:
  - This is an on-going evaluation process and delivery agencies felt they needed more experience before answering these questions.

- Communication Process:
  - Input into the creation of this project in many cases was given by individuals who were not involved in the project itself. The amount of time from when the project was discussed until it was funded left people confused about what they had agreed to do.
  - Delivery agencies felt they were given ample opportunity for input into the project as it progressed, but the timing of the project was difficult for them. It was requested that any future projects begin in the fall for agency staff to have full involvement (this does not mean that the research portion of projects cannot begin before this).

Section 4



Field Test with Quill Network

QUILL is field testing the model developed by PRLN to see how it applies in a rural environment. The following are the results of their initial planning meeting.

(For a copy of the PowerPoint Presentation made for QUILL network with notes see Appendix 6, Pages131- 139)

QUILL requested a meeting of all interested programs within their region to review the current process and the following are questions and/or concerns expressed by the group:

1. Clarity was needed on champions, meaning supporting groups/ unions/businesses/other.

2. Clarity was needed on the differences between workforce and workplace literacy and definitions were required.

3. Organizational Needs Assessments or ONA needs clarification ...if the network does it, it must be viewed more as a scan than an individual needs assessment.
   - **Why would employer want an ONA and not the full needs assessment? This must be reviewed more within the marketing portion of the next projects. Employers will not be patient with time -consuming projects, the ONA description needs to be very clear. The benefits to the employer must be easily seen.**

4. It was agreed that the network should be the coordinating body, as one point of contact would be preferable.

5. Concerns were expressed on who will provide workplace training ...is it mandatory? Consensus was that each program should provide workforce training, but workplace training should be optional.

6. Concerns were expressed by programs already doing workplace training and cultivation. It is important to establish the guidelines on who will be contacted and which contacts currently have an established relationship with a provider.

7. Concerns were expressed on how business/employers may view a literacy network within a region. Do they take them seriously? OR Do they see them as lacking in business expertise?

8. The idea of sub-contracting was given support. It can allow the business the right to pick any provider they choose, even if their training requirements do not fit the niche of that provider.

9. **When marketing services and fee ranges it must be clear what the business is getting within the $50 to $125 fee range and is this marketable?**

10. QUILL providers preferred the coordination model for their network, as it is something they are comfortable with from the LSP coordination role.

11. They agreed that recognition would best be done between the provider and the company they are working with.

12. For the providers at the table, there was *100io* buy-in to the process and willingness to proceed forward.

CONCERNS:
The only major concerns not previously expressed were that providers who had worked together during the LSP suddenly saw each other as new competition and it may create a new set of group dynamics.

BENEFITS AND RISKS OF WORKPLACE EDUCATION:

The following benefits and risks were identified by LBS providers and other stakeholders at a workplace training event held by the Ministry of Training Colleges and Universities - Literacy and Basic Skills Section on May 17, 2001.

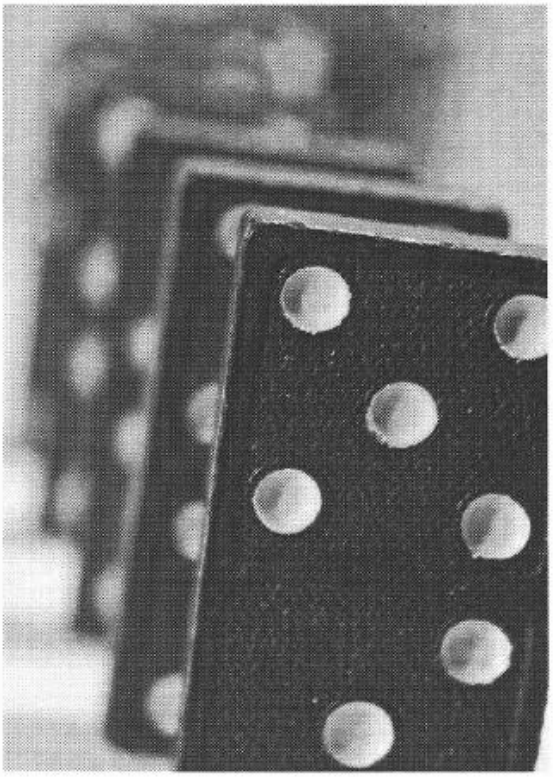
BENEFITS:

1. It will provide a better understanding of workplace education and skills to identify and locate materials relevant to students' needs.
2. It will provide strong links within the community between providers and employers.
3. It will benefit the individual learner (i.e. employability).
4. It will open a door of opportunity for present learners to access employers.
5. It will be good for agencies to better understand "corporate speak" and training philosophies.
6. It will contribute to improved productivity ($) in the workplace.
7. Fee-for-service can open new doors for opportunities ...increased hours and/or wages for practitioners.
8. If approved by management or governing board there will be a permanent effect!

RISKS:

1. Learners may lose track as things may move at a faster pace than they can handle.
2. There is a difficulty in accessing "start-up" resources (i.e. time for development of partnerships and program/materials).
3. That there may not be efficient, lasting marketing of such programming.
4. Our own knowledge base is not as strong as needed.
5. Not being adequately prepared and seeming to be unprofessional.
6. Managing the time commitment.
7. Access to adequate "start-up" funds.
8. Arranging fee-for-service plan.
9. Workers may be too tired after shifts ...extra time.

Section 5



Recommendations

Fact: Training for providers is key before you start to offer workplace education programs.

Based on the experiences from our network, we recommend the following:

1) No matter what, offer training for your providers before you start marketing workplace education. Some topics to offer are: needs assessment, curriculum development, cost benefits, etc. Not all providers have workplace experience and may be intimidated by workplace education.

2) Create awareness of the importance of literacy in your community first by doing a region wide literacy awareness campaign. Some options are having breakfast meetings, speaking at local associations etc. Once companies are aware, then you can be more successful marketing workplace education.

3) Be patient. It may take months of work before a contract is received. Use this time to make sure all the providers are trained and comfortable with their role in workplace education.

4) Have the key decision makers at the table from the beginning. This saves time in the long run by being able to make decisions immediately instead of having to wait 2 weeks.

5) Keep providers informed of contacts/contracts the network is in the process of finding. Trust of the network by the providers is key for this model to work. It is a very collaborative model and must stay that way throughout.

6) Involve the providers in the content of the marketing materials. It is crucial to have the correct information from each provider marketed. Have the providers proof-read the final copies of materials.

7) Spend the money necessary to create professional looking marketing materials. You are marketing to companies who make money and need to market workplace education in a way familiar with that market.

8) Set up a discussion group on Alphaplus to use as a means of communication, as well as face-to-face meetings. Providers are busy and once you have the base information, group meetings are not necessary. Time can be better spent using Alphaplus and email.

9) Keep current on all of the workplace projects and programs that are currently being offered and pass that information along to your providers.

10) Make sure that once you start marketing you don't stop. It is key to always create a demand for your product. You may need to hire a part time or full time person to do this.

Challenges Faced and Overcome

The following are challenges faced during this project and how we either overcame them or how we would address them differently.

1. Group Dynamics: The project coordinators assumed the delivery agencies would work together well, as they had been involved in a similar process through Literacy Service Planning. Unfortunately, this was not the case, as with larger delivery agencies there are different individuals doing workplace training coordination. As previously suggested, we would work on teambuilding and trust exercises to create a more trusting environment. It is also significant to note that this project began in June, which meant many of the key players were on holidays throughout the summer months and that meant the group dynamics changed a number of times. It is important to ensure that meetings are not scheduled over summer months, as important decisions cannot always be made at that time.

2. Developing Service Niches: The workplace strategy from the Ministry of Training, Colleges and Universities allows for funding of the marketing of workplace, but not for delivery. This leads to a very difficult problem, as groups will see workplace education as a means of enhancing their budgets. We found that the way around this issue was to discuss quality of service and the evaluation process. Customer service is a key factor in delivering workplace education and all delivery agencies wanted to maintain their high quality profile in their respective communities.

3. The network being the referral agency. This includes who would do the Organizational Needs Assessment. It was not as big a challenge as we first anticipated. Project READ already did individual assessments for Ontario Works' clients in Waterloo Region and the delivery agencies see the network as being a neutral body that is capable of doing fair referrals. It will be essential for other networks who do not have a centralized assessment process to develop a strategy with all delivery agencies on how and who will do referrals and ONA's within their regions. Stressing the need for consistency with all delivery agencies will be of great importance. For some networks, a training session on the value of common assessments and "one-point-of-contact" marketing will be essential.

4. Gathering of information. Delivery agencies feel bogged-down with the amount of information and paperwork they are required to do. Adding on requests for information from this project became overwhelming. The agencies suggested that in the future, we always add in replacement dollars for staff time in all project grant budgets. We also found that bolded action points at the end of minutes indicating who still needed to give us information was helpful.

5. Time. Is there ever enough time or money to do everything you want to do? That answer is obvious, but in this case we ran into difficulties with the aforementioned challenges and the challenge of the need for education and training for delivery agencies on workplace education. To ensure that our model was something all our delivery agencies would be willing to work within we had to slow down the process and provide appropriate training and time for everyone to feel comfortable with each step.

Accomplishments

We do feel it is important to point out the accomplishments we made. Even if there were struggles and challenges, it is important to celebrate the achievements of the hard work done by Waterloo-Wellington delivery agencies.

The following is a list of those accomplishments:

1. Agreement on service niches. The delivery agencies were able to establish their service niches and agree to focus their workplace training on the niches. It was even decided that if a workplace chose a specific agency for training and that agency did not fit all the training requirements, they would sub-contract the portions of the training to the appropriate agency.

2. Agreement on referrals. It was agreed that the network would be the referral body for workplace training and perform the initial ONA. Currently, when companies or businesses contact an agency in regards to literacy needs, the agencies are referring the business to the network or the agency is calling the network with the contact information.

3. *100%* involvement. All delivery agencies agreed to be involved in workplace education. It was difficult for many of the community-based organizations to see where or how they fit into workplace education at first, but with more information and training they were all willing and eager to provide this service.

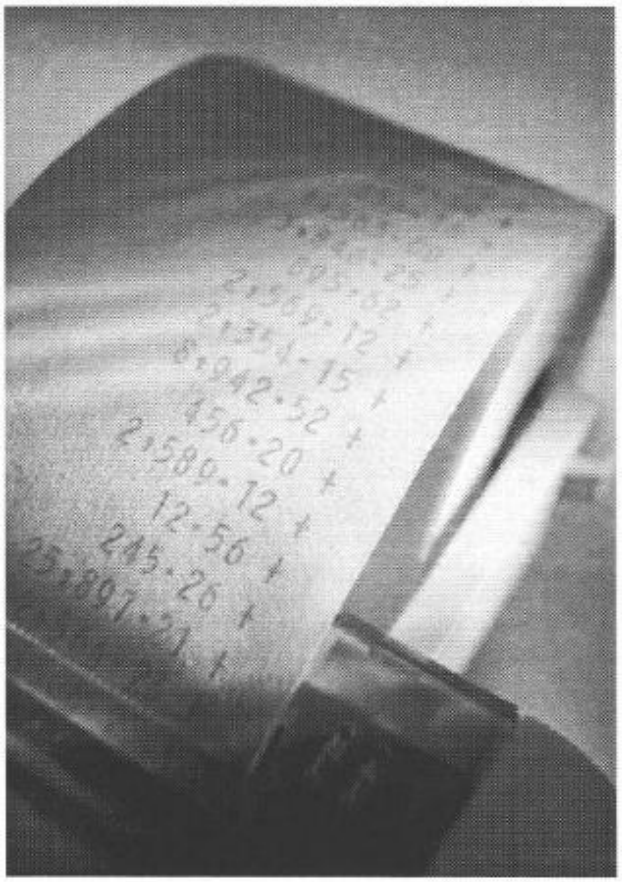
4. Sharing of information. At first, agencies involved in workplace education were hesitant to share the charges for their services. The fear was based on others potentially "undercutting" their rates. However, all the agencies agreed to charge on one scale ranging from $50 to $100 per hour, dependent on the training required.

5. Marketing Materials. When presented with the first draft of the marketing materials, the delivery agencies only had minor wording changes and a request that their be separate brochures for Waterloo and Wellington. The agencies were provided with a variety of layouts from the desktop publisher and were unanimous in their choices for the end products. Being allowed full input and having their suggestions worked into the materials gave the agencies a solid comfort-level on the end products.

6. Evaluations. The delivery agencies needed to know that the evaluation results would be shared with them first and would allow for their input and not just be based on how the workplace evaluated their services. Once this was established, the agencies all agreed it would be important to have the network do the evaluation of services to maintain a form of quality control.

7. Support the delivery agencies participated in this project at their own cost. This means they provided staff for our meetings and gave staff time off to be involved in the training sessions. This is a major accomplishment and shows the dedication and support the delivery agencies give to not just the network, but the literacy field in general. Thank you to our delivery agencies!

Section 6



Financial Requirements

PROPOSAL OF:
Financial Requirements for Networks
to Provide Workplace Training Coordination

FIRST YEAR EXPENSES	$
Marketer with literacy knowledge (12hrs/wk)	$ 17,500.00
Travel	$ 1,500.00
Workplace Planning Process Coordination	$ 6,000.00
Replacement $ for provider staff in process (based on $250/agency @ 8 agencies)	$ 2,000.00
Office Supplies	$ 1,000.00
Advertising	$ 1,500.00
Postage/Telephone	$ 1,200.00
Administration (supervision/rent/equipment)	$ 3,000.00
TOTAL	**$ 33,700.00**

FOLLOWING YEAR EXPENSES	$
Marketer with literacy knowledge (10 hrs/wk)	$ 14,600.00
Travel	$ 1,200.00
Office Supplies	$ 750.00
Advertising	$ 1,200.00
Postage/Telephone	$ 1,000.00
Administration (supervision/rent/equipment)	$ 2,000.00
TOTAL	**$ 20,750.00**

This assumes that marketing materials will be provided by MTCU.

RATIONALIZATION OF FINANCIAL REQUIREMENTS:

It is important to note that the first year will require more money, time and energy to ensure success. Subsequent years of funding will be consistent with cost of living increases, but will remain more constant.

The budget is bare-bones. This is the minimal amount networks will need to coordinate workplace training for their regions.

- ☑ Marketing
  - this will require expertise to be successful.
  - there are skills involved in marketing that are different from most skills found within network staff.
  - it would be best to have someone for 15 to 20 hours per week, but financially, probably not feasible.
  - in subsequent years, the number of hours required can be decreased but it is preferable to have 10 to 15 hours per week.
- ☑ Travel
  - the individual doing marketing will be traveling to make contacts and presentations.
  - travel time would have to increase for larger geographic regions.

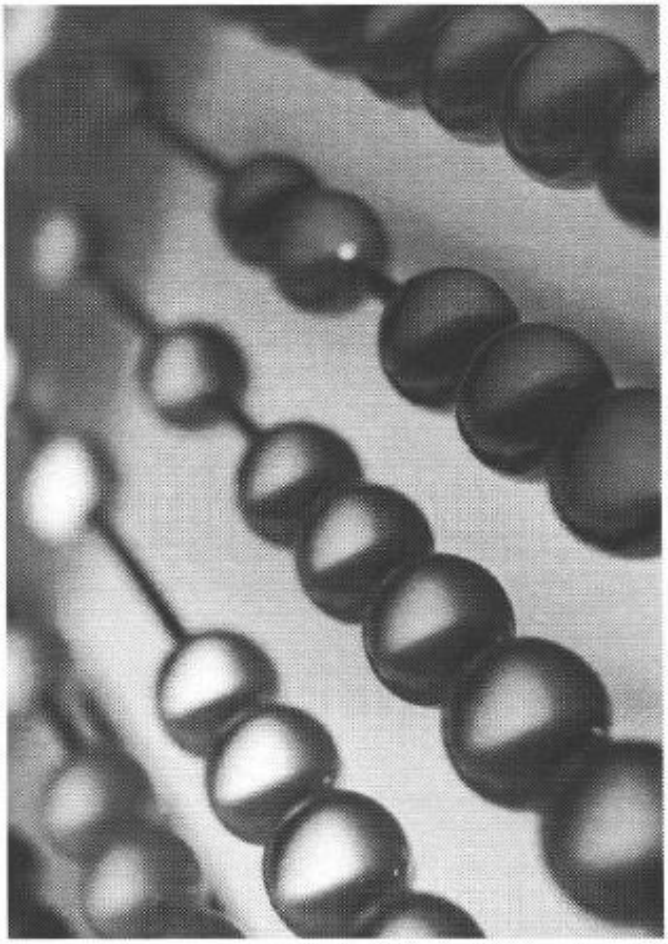
- ☑ Coordination
  - the first year will require coordination of the workplace planning process.
  - it will require developing regional protocols.
  - it will require coordination of information, training and meetings.
  - in following years, updates or information can be shared through the LSP process.

- ☑ Replacement $$
  - to ensure buy-in and cooperation from providers respect for their time is a requirement.
  - individuals are more willing to attend meetings when they know their time is being compensated.
  - to help avoid overload ...most agencies are feeling great time constraints, replacement $$ helps to alleviate any extra work created by the process.

- ☑ Advertising
  - part of the marketing process is to advertise.
  - newspaper ads are good products to add to the marketing package.
  - professional PSAs get more play.

- ☑ Postage/Telephone
  - as can be seen from the marketing plan/strategy telephone calls and mailing are the essential components of marketing.

Section 7



Bibliography and Other Useful Resources

Newsletters:
Literacy At Work - ABC Canada*(amazing information for workplace literacy)* Learning Together: Solidarity at *Work (newsletter of the Canadian Labour Congress)*

Projects:
Union Building Through Basic Skills Training *(CUPE National Literacy Project Reference Group)*
Unions & Literacy - Building Bridges to Solidarity *(Canadian Labour Congress Workplace Literacy Project)*

Books:
Collaborative Workforce Development, An Overview. Sue Folinsbee and Paul Jurmo, ABC Canada,1994

Collaborative Needs Assessment, A Handbook for Workplace Development Planners, Sue Folinsbee and Paul Jurmo, ABC Canada, 1994

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Basic Skills for the Workplace, Maurice C. Taylor, Glenda R. Lewe, James A. Draper, Cultural Concepts Inc., 1991

Work Together, Learn Together, A Model that Incorporates Community Partnerships. Sponsored by National Literacy Secretariat, by Carol Leef and Tamara Riddle, 1996

How to Set up Literacy and Basic Skills Training in the Workplace, Various Authors, Literacy Branch, 1989

Literacy: The Basics of Growth, Ministry of Skills Development

Human Resource Study of the Canadian Grocery Products Manufacturing Industry, by the Canadian Labour Market and Productivity Centre, December 1997.

Streetwise - Do It Yourself Advertising, Create Great Ads, Promotions, Direct Mail and Marketing Strategies that will Send Your Sales Soaring, Sara White and John Woods

How to Develop and Promote Successful Seminars and Workshops. The Definitive Guide to Creating Marketing Seminars, Workshops, Classesand Conferences, Howard L. Shenson

Workplace Literacy Product Checklist: Judging the Quality of Workplace Literacy Products, Terri Bergman,Louise Bertsche, Stephen Mitchell, National Alliance of Business, Annapolis Junction, MD, 1995 *(Can be used to determine whether a particular workplace product (i.e.: series of instructional workbooks or computerized instructional system) follows best practice and*

will meet the needs of your firm and build the productive capacity of its employees. Also allows you to evaluate what parts of a workplace literacy program your firm is prepared to undertake in order to successfully integrate the literacy product your ultimately select into your companies practices.)

Needs Assessment in Workplace Education, Dale C. Brandenburg, Ph.D, and Rita C. Richey, Ph.D,Wayne State University, National Workplace Literacy Program, 1998

Websites:

Union information:
Canadian Auto Workers Association - www.caw.ca
United Food Commercial Workers - www.ufcw.ca
Canadian Labour Congress- www.clc-ctc.ca
Ontario Federation of Labour - www.ofl-fto.on.ca
Teamsters Canada- www.teamsters-canada.org
Union of Needle trades, Industrial, and Textile Employees (UNITE) - Canadian Office - www.unite-svti.org
Local Training and Adjustment Board - www.wwtab.com
Auto Parts Manufacturing Association - www.capma.com

Workplace Literacy
ABC Canada (Workplace Education)-
www.abc-canada.org/our publications/index.asp

Conference Board of Canada- winners, partnerships, benefits, case studies etc.
www.conferenceboard.ca

ERIC Digest - Clearing House on Adult, Career, and Vocational Education - lots of good information on workplace literacy) www.ericacve.org
Frontier College - www.frontiercollege.ca
HRDC- www.hrdc-drhc.gc.ca/common/work.shtml
Introduction to Workplace Literacy for Practitioners
http://www3.sk.sympatico.ca/liters/practionersmodule.htm

Inside Three Workplace Literacy Initiatives: Possibilities and Limits of Vocational Institutions, Journal of Industrial Teacher Education 33 (1),60-82, Theodore Lewis, University of Minnesota, www.scholar.lib.vt.edu/ejournals/JITE/v33nl/lewis.html
Institute for the Study of Adult Literacy, www.ed.psu.edu/isal/

Links to Adult Education and Workplace Literacy - Frontier College, American Society for Training and Development, Employment Training Network, ERIC Clearinghouse, Laubach Literacy, National Clearinghouse for ESL Literacy Education (NCLE), Virginia's Workforce Improvement Network www.albany.net/~bmarino/links.htm

Literacy Link Eastern Ontario - www.inkingston.com/lleo/html/training.htm.
(has information on all kinds of different workshops - may be good for general information aspect of literacy etc.)

Metro Labour Education Centre - www.mlec.org/links

NALD - www.nald.ca *(lots of excellent resources on workplace literacy)*

www.nald.ca/province/gue/litcent/PublicationProducts/catalog/worker.htm
Bibliography of Workplace Resources - www.nald.ca/NLSinpub/biblio.htm
(under .Information for Business and Technology" this site has information on defining workplace education business perspective, running a workplace education program, other on-line publications and workplace education contacts in other provinces).

www.nald.ca/PROVINCES/SASK/wecs/c1.htm

The Impact of Workplace Literacy Programs - A New Model for Evaluating the Impact of Workplace Literacy Programs
www.nald.ca/FULLTEXT/REPORT3/REP22A/rep22-01.htm

Workplace Literacy and Basic Skills - *lots of good information here – very relevant and useful- key factors in setting up workplace, different ways workplace needs can be addressed, getting started etc.)*
www.nald.ca/nls/inpub/worklit.htm

The Economic Benefits of Improving Literacy Skills in the Workplace *–lots of interesting information here)* www.nald.ca/FULLTEXT/economic/pl.htm

Lots of good information on workplace literacy - business issues, checklists, implementing the program etc. www.nald.ca/province/sask/wecs/builskil/

Manitoba Association of Workplace Educators and Consultants – *information about how they run their organization*
www.nald.ca/PROVINCE/MAN/Mawec/About/about.htm

Workplace Education PEl - www.nald.ca/wepei.htm

Western CanadaWorkplace Essential Training Skills Network (WWestNet).
www.nald.ca/WWestNet/index.html

National Institute for Literacy (excellent source of information, access to discussion groups etc.)
www.nifl.gov

Peel-Halton-Dufferin Adult Learning Bookstore (Assessing the quality and impact of Workplace Literacy Programs, Marketing Workplace Basic Skills)-

www.phdaln.on.ca/phdaln/Neighbhd/Bkstore.html

SABES Bibliography: Workplace Education (USA)- www.sabes.org/bibwork.htm

SABES Bibliography of Workplace Education - www.sabes.org/bibwork.htm
(has to be signed out- USA site)

Planning and Evaluation Teams - A Model for Workplace Education.
www.sabes.org/aia91.htm

Stats Canada- *literacy ski/Is, statistics, general facts related to literacy*
www.statcan.ca

Test of Workplace Essential Skills- *has a bank of items, which can be used to crate a number of valid assessments for specific situations.* www.towes.com

Training and Development Program
www.state.sd.us/state/executive/bop/training/training.htm

Waterloo-Wellington Training and Adjustment Board - www.wwtab.com
(go to LINKS and check out the Canadian Technology Triangle for information on different companies if you ever need to get general information about companies)

Workbase: The National Centre for Workplace Literacy and Language *(just general information)*- www.workbase.org.nz/

Workforce Improvement Network (USA)- http://cep.jmu.edu/workforce/program

Workplace Literacy Issues in Canada- *interesting read*
www.nald.ca/fulltext/Brekfast/cover.htm

Workplace Literacy Publications - www.nald.ca/NLS/inpub/biblio.htm

Workplace Training and Services www.trainingwts.com

Interesting article - case studies had neat perspectives - kind of long - but worth reading some specific sections that may be more relevant to your organization than others.
http://ncrve.berkeley.edu/AllInOne/MDS-880.html

Marketing Websites:
www.eastendliteracy.on.ca/ciearlanguageanddesign (East End Literacy, click on Canadian Literacy Facts to get some good information to incorporate into marketing materials)

www.businesstown.com *(Creating marketing plans)*

www.redhotsales.com *(The Ten Commandments of Prospecting)*

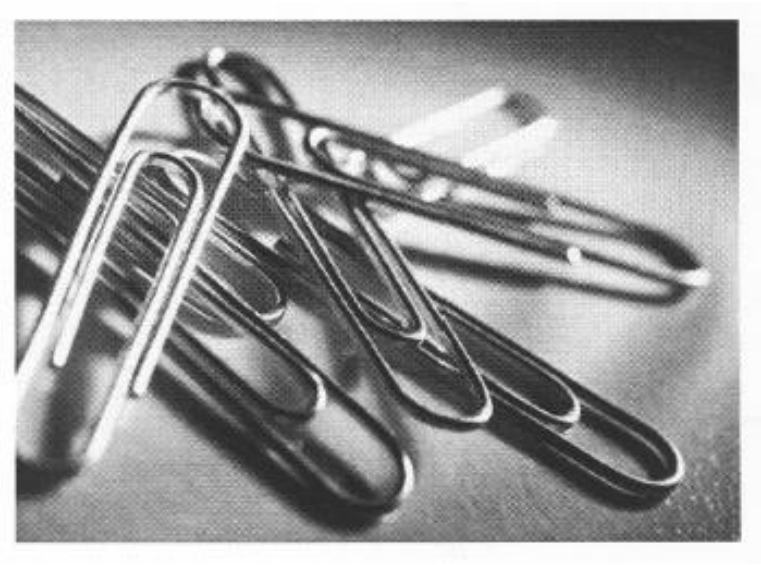
www.actionplan.com *(The 5 P's of Professional Service Business Marketing – very good resources)*

www.salesacademy.com *(The Top10 Variations of Asking the Basic Qualifying Questions - BQQ).*

www.bizine.com *(Sales Letter, Not Announcement - good resource on how to write a sales letter)*

www.asha.org *(Marketing Worksheets - marketing plan checklist, mission statements, rules, tools in public relations, marketing tips)*

Tools For You



APPENDICES

Appendix One - Questions to Ask Literacy Providers

Appendix Two - ONA Questions

Appendix Three - Administrative/Practitioner Training Handouts

Appendix Four - Marketing Materials

Appendix Five - Proposals and Contracts

Appendix Six - Presentation to QUILL Network

Appendix One:
Questions to Ask Literary Providers

QUESTIONS TO ASK WORKPLACEUTERACY PROVIDERS...

Please be as descriptive as possible. Answers should be based on workplace literacy only. Thanks.

EXTENT AND TYPES OF WORKPLACE EDUCATION ACTIVITIES PROVIDED.

1. Do you offer workplace education programs? If yes, what LBS level are they?

2. If you are not offering workplace programs now, have you offered them in the past and what LBS level were they?

3. Do you offer upgrading programs?

4. Where do you deliver programs? (i.e.: at your location, worksite, or both)

5. Do you administer the GED or provide GED preparatory work?

6. Do you offer ESL programs?

7. What percentage of your workplace education programs are ESL orientated?

8. Have you been involved in providing co-op programs? (i.e.: programs, which involve employees from a number of different businesses, businesses within the same industry or region?)

9. Do you charge a fee for your workplace programs?

INSTRUCTIONAL METHODS, EDUCATIONAL MATERIALS AND RESOURCES USED

10. What method of instruction do you use? (i.e.: peer or 1-1 tutoring, small group, classroom)

11. What type of educational materials or curriculum do you use?

12. Have you developed and/or produced any materials? (i.e.: programs, curriculum, handbooks, brochures)

13. What types of methods of instruction have been most successful in your experience?

14. What types of workplace education methods of instruction have been least successful and why?

NEEDS INTEREST IN, AND DEMAND FOR WORKPLACE EDUCATION PROGRAMS BY BUSINESS, UNION AND INDIVIDUALS

15. Have you identified any educational needs/trends, which apply specifically to a certain population sector, region, industry, or occupation?

16. What specific businesses are you aware of that would benefit from a workplace education program?

17. What companies have asked for information about workplace education, but have not yet implemented programs or have decided against them?

18. What do you think are the main reasons why businesses do not pursue or decline to implement workplace education programs?

19. What businesses have you delivered/are delivering workplace education programs for?

20. Of the businesses that you work(ed) with, who initiated contact (you, the business, the union)?

21. What are some of the reasons that businesses/unions gave you for needing your workplace program?

22. How many workplace education programs have been requested by businesses for skills upgrading due to technological change?

23. Do companies who have implemented workplace education in the past with you, feel that they have an ongoing need for workplace education programs?

24. Have you implemented programs continuously at any worksite? Please specify. (i.e.: could be the same program implemented more than once, programs which are in a series, or could be several different programs focusing on several different areas)

UNIONS AND WORKPLACE EDUCATION

25. Are there particular unions that have a stronger commitment or interest in workplace education?

26. Do you find that workplace education programs are easier to implement in unionized environments?

BENEFITS OF WORKPLACE EDUCATION, ASSESSMENT AND FOLLOW-UP

27. What difficulties do you have in assessing the success or benefits received from workplace education?

28. What difficulties do employers have in assessing the Success or benefits received from workplace education programs?

29. What difficulties do employees have in assessing the success or benefits from workplace programs?

30. When thinking about the successful workplace education programs that you have been involved with, what were the common factors that contributed to their success?

WORKPLACE EDUCATION CHALLENGES, CONCERNS AND OBSTACLES

31. What concerns are most often voiced by employers regarding workplace education programs?

32. What concerns are most often voiced by employees regarding workplace education programs?

PRESENT INTEREST IN WORKPLACE EDUCATION PROGRAMS

33. Have you experienced an increase or decrease in inquiries about workplace education programs from the business community or has it remained about the same over the past 12 months and 24 months?

34. Have you experienced an increase or decrease in implementation of workplace education programs in the past 12 months and 24 months?

35. Do you think that there are particular business sectors or industries with a greater interest or understanding of workplace education? Who are they?

36. In your opinion, what are the particular sectors or regions that need special contact or attention in order to increase their level of awareness and understanding of workplace education programs?

37. What types of promotion have you been using?

38. Do you have any suggestions on how best to increase the awareness and understanding of workplace education in the business and industrial sectors?

NETWORKING, COMMUNICATION AND COORDINATION

39. Do you have any ideas on how to develop a more effective network specifically for workplace literacy?

Appendix Two
ONA Questions

QUESTIONS TO ASK YOUR EMPLOYEES(ONA)
HELPFUL HINTS ...

- Explain to the employees why you are here. Let them know that any information you receive from them is confidential and will not identify them in any way.
- Try to keep a conversational tone to your interview. Try not to ask questions word for word. Allow for flexibility.
- You will gain more information from the employee if you take an interest in them as a person as opposed to just the next employee to be interviewed.
- Interviews with employees should be kept to about 20 minutes each. Therefore, pick and choose the questions you ask.

1. What is your job title?

2. What shift do you work? (circle one)
   Days Afternoons Midnights Split shifts

3. How many years have you been working at this job?

4. Have you had other jobs here? If so, how many years were you at these other jobs?

5. Have you done the kind of work you do now at other companies?
   Yes No

6. How many years did you do this kind of work?

7. Where do you do this job?
   Same place everyday Moves throughout plant Other

8. Please describe the setting where you work in detail.

9. Who do you work with?
   Alone Co-workers Supervisors Engineers
   Other,

10. What other languages have you noticed that are spoken here?

11. What do you do on your job (details - from when you arrive to when you go home)?

12. How are instructions/directions given to you?
    Orally Written No directions given

13.Do you think this kind of direction is typical of this organization?

14.Do you have anything to say about how you receive your directions?

15.On an average day, how frequently do you get spoken, written directions?
Never 1-2 times 3-4 times 5-6 times 7 or more

16.How frequently do you use forms?
Never 1-2 times 3-4 times 5-6 times 7 or more

17.Describe the forms you use and how you use them.

18.Do you use computer screens or terminals? Yes No

19.How do you use them?

20.How often do you use computer screen or terminals per day?
Never 1-2 times 3-4 times 5-6 times 7 or more

21.Who do you contact if there is a problem or breakdown? Who else?

22.How do you contact them?
Spoken Written Other

23.What types of tools and equipment do you use on your job? Describe them in detail.

24. What types of computers and electronic equipment do you use?

25.How important is reading in your job?
Not at all Not much A fair amount A lot

26.How frequently must you read on an average day?
Never 1-2 times 3-4 times 5-6 times 7 or more

27. What is it that you have to read that is most critical in getting the job done right?

28. What do you do if you cannot read something?

29. What happens if you misread something?

30. What type of math do you need for your job?

31. Ask questions about the kind of things they do - i.e.: what types of # do you add, subtract etc., charting, graphing etc.

32. What do they do if they are not able to do the math?

33. What happens if they make a mistake on their math?

34.In an average week, how often are you faced with a problem while you do your job?
Never 1-2 times 3-4 times 5-6 times 7 or more

35.Get an example of a typical or common problem.

36. What is the most recent problem they have had to solve?

37.Ask how they solve the problems - alone or group?

38.How important is problem solving in your job?
Not at all A little Average Very much so

39.Is there a difficult part of your job? Describe it.

40.Did you have any training when you started this job - what kind of training, when did it occur, how was the training conducted, waS the training helpful?

41. Is there any other training that you think would have been helpful- what is it?

42.How did you learn to do your job?
Formal training Someone showed me By myself Other

43.How are employees chosen for new job opportunities?

44.Howsatisfied are you with your job?

45. What could be done to make it easier for you to do your mob?

46.How would you describe your relationship between your co-workers are upper management?

47. What things are looked at to determine if you are good at your job?

48. What do you think should be taught in this educational program?

SAMPLE QUESTIONS TO ASK EMPLOYERS (ONA)

1. What is your job title?

2. What are the main responsibilities of your department? (List them)

3. What are the measures of productivity in your area?

4. How much of your work involves customers or other departments in the company?

5. Have you identified any productivity problems related to your area?

6. How many people do you supervise in your area?
   None One-2 3-4 5-6 7+

7. What are the job titles of each person in your area?

8. What is the typical work experience in your area?

9. On a normal day, how do you give directions to the people you supervise?
   Orally Written No directions given

10. On an average day, how frequently do you give spoken directions?
    Never 1-2 3-4 5-6 7+

11. How critical are these spoken directions?
    Not at all A little Average Very much so

12. On an average day, how frequently do you give written directions?
    Never 1-2 3-4 5-6 7+

13. How critical are these written directions?
    Not at all A little Average Very much so

14. Is there any difference in this communication when there is a breakdown or material problem?

15. What tools and equipment do your employees have a problem with?

16. On an average week, how frequent are these problems?
    Never 1-2 3-4 5-6 7+

17. How does this impact productivity?
    Not at all A little Average Very much so

18. Do you think your employees have adequate tools and resources to get the job done?
    Yes No

19. Describe situations involving math that employees seem to have difficulty with.

20. What kind of math do your employees need to know?

21. Describe any situations involving reading that your employees have difficulty with.

22. How frequent are those reading problems?

23. How critical are those reading problems?

24. What impact do those reading problems have on productivity?

25. Describe any situation involving problem solving that your employees have problems with.
    How frequently? How critical?

26. What is the impact on productivity?

27. What kind of problem solving skills do they need to have?

28. Is there any training provided for your employees? Yes No

29. What training?

30. When does it occur?
    None at very beginning of job Quite frequently Every so often

31. How is the training done?
    Individual Instructor led Small group Computer based
    Large group Video Other

32. Is there any other training that you think would have been helpful for your employees to have had?

33. What is it?

34. How do your employees learn their jobs?
    Formal training Somebody showed them Other By themselves

35. How are employees chosen for new job opportunities?

36. Describe any changes in the next 2 years that may require employees to use higher-level skills.

37. How satisfied are your employees with their job?
    Very satisfied Satisfied Somewhat Satisfied
    Somewhat Dissatisfied Dissatisfied Very Dissatisfied

38. How satisfied are supervisors with their jobs?
    Very satisfied Satisfied Somewhat Dissatisfied
    Somewhat Satisfied Dissatisfied Very Dissatisfied

39. What could the company do to make it easier to do your job?

40.How would you describe the relationship between other supervisors and the employees?

Poor Fair Good Very Good Excellent

41. What do you think should be taught in this educational program?

Observation Checklist for Tours

Tip: If you are going into a factory setting, dress accordingly.

1. What is the physical environment of the workplace in general?
   Clean or dirty
   Quiet or Noisy

Ventilation	Good	Bad	
Temperature	Hot	OK	Cold
Vandal ism/ Graffiti	Yes	No	

2. What furnishings do employees use?

3. What personalization of the employee work areas exist?

4. What is the overall atmosphere of the plant?

5. Draw a physical map of the workplace and attach it to the form.

6. What is the physical environment of the individual work areas or line?
   Clean or dirty
   Quiet or Noisy

Ventilation	Good	Bad	
Temperature	Hot	OK	Cold
Vandalism/Graffiti	Yes	No	

7. What furnishings do employees use?

8. What personalization of employee work areas exist?

9. What is the overall atmosphere of the plant?

Job Process

1. What interaction/communication does the worker have with ...

   - Frequency Codes?
     01 Frequent 02 Infrequent 03 Not at all

   - Criticality Codes?
     01 Very critical 02 Critical 03 Less critical

	Verbal		Non Verbal		Written	
Person	Frequency	Criticality	Frequency	Criticality	Frequency	Criticality
Supervisor						
Worker						
Clients						
Vendors						
Front Office						
Others						

2. What is the reaction of the workers to observers? *Circle answer*
   Friendly Open Suspicious Nervous Relaxed

3. Does the worker have suggestions to improve the job process?
   No Yes

4. Has the worker communicated the suggestions?
   No Yes

5. How has the worker communicated the suggestions?

6. To whom were the suggestions communicated?

7. What action was taken on the suggestions?

Print Environment

1. What print materials are present in the plant in general?
   - ~ Bulletin boards Yes No
   - ~ Newspapers Yes No
   - ~ Safety Signs Yes No

2. What signs are present?

3. What notices or announcements are present?

4. What print materials are at the workstations?
   - Preventative Maintenance Notices Yes No
   - Safety Signs Yes No
   - Books or manuals Yes No
   - Tally Sheets Yes No
   - Tags in Basket Yes No

5. Is there any indication the worker avoids reading? Yes No

6. What are the indications?

7. What documents have to be read?
   - Frequency Codes
     01 Frequent 02 Infrequent 03 Not at all
   - Criticality Codes
     01 Very critical 02 Critical 03 Less critical

Document	**Frequency**	**Criticality**
Tally Sheets		
Downtime Sheets		
Rejection Sheets/Red Tags		
Memos		
Alerts		
Manuals		
Logbooks		
Other		
Other /		

8. What documents have to be filled out or written?

- **Frequency Codes**

  01 Frequent 02 Infrequent 03 Not at all

- **Criticality Codes**

  01 Very critical 02 Critical 03 Less critical

Document	**Frequency**	**Criticality**
Tally Sheets		
Downtime Sheets		
Rejection Sheets/Red Tags		
Memos		
Alerts		
Manuals		
Logbooks		
Other		
Other /		

9. What math computations are performed on the job?

- **Frequency Codes**

  01 Frequent 02 Infrequent 03 Not at all

- **Criticality Codes**

  01 Very critical 02 Critical 03 Less critical

Document	**Frequency**	**Criticality**
Addition		
Subtraction		
Multiplication		
Division		
Fractions		
Decimals		
Averaging		
Charting		
Graphing		
Measurement		
Other		
Other		

10. What tools are used on the job?

- Frequency Codes

  01 Frequent 02 Infrequent 03 Not at all

- Criticality Codes

  01 Very critical 02 Critical 03 Less critical

Document	**Frequency**	**Criticality**
Screw Drivers		
Hammers		
Check Fixtures		
Other		
Other		
Other		

11. Do the tools belong to the individual or the company?

    Individual Company

12. Are there adequate tools to do the job?

    Yes No

13. If no, what tools are needed?

14. Are tools organized so that they are readily available?

    Yes No

15. What materials are used?

16. Are materials available in a timely matter?

    No Yes

17. When are the materials used?

    Before During After

18. Are there any hazardous materials?

    No Yes

19. If yes, what types of hazardous materials?

20. Does the worker have any control over the use of the tools or materials?

    No Yes

Instructional Environment

Describe the instructional environment.

Size of room:

Tables:

Electrical outlets:

Storage:

Lighting:

Accessibility:

Areas of privacy:

Noise:

Temperature:

Ventilation:

Bulletin Boards:

Chalkboards:

Appendix 3:
Administrative and Practitioner Training

Administrative

Making A Presentation on Your Services

Work in small groups to develop an outline for a presentation that you will make to a worker/management committee (from 4 to 8 people) on one particular program, workshop or service that you might be requested to deliver from the needs coming out of an ONA. You will have half an hour for the presentation--15 minutes for the presentation and 15 minutes for questions. Be prepared to present your outline to the large group. Here are some ideas to select from:

- a program on basic math dealing with measurement and metric conversions, math for conducting averages for Statistical Process Control in a food processing factory
- a basic computer course for beginners in a department store
- a clear language workshop for workshop writing for supervisors and managers in a textile factory
- a part-time, drop-in program for a factory where people can get tutoring and help with reading, writing, math and computers
- or choose something else you might deliver

Consider the following in the outline your presentation:

- How will you present yourself and your organization to the company?
- What kind of process will you present to the workplace in terms of getting the program up and running and ensuring it is on track?
- How will you ensure that the interests of management and workers are included in what you say (i.e. that both will feel comfortable with what you have to offer?)
- What will you pay attention to in the style and language of your presentation?
- What medium will you use-- overheads, video, handouts, etc? Why have you chosen this particular medium?

Developing Contracts

Work with another person to look at the various contracts or letters you have in front of you. What features do you like? What don't you like? Make 1) and outline for a proposal for one of these and 2) make up your own contract for one of the following options. Each pair's contract will be made available to the rest of the group.

- a 12-week, on-site computer course for 20 people. Each person will get 12 hours of training.
- a one-day clear language workshop
- a 12-week drop in program for the basics-- 2 times a week-- 3 hours at a time.

Consider the following:

- roles and responsibilities
- timelines for completion of different phases of work
- hidden costs like preparation, meetings. management time as well as actual delivery and teaching time
- cost-- what is the going rate for similar kinds of work in your region

Working through the Workplace Literacy Process: A Workshop for Delivery Agencies

An Outline for a Presentation to a Workplace

1. Short introduction to you and your organization and its track record.

2. A description of what you can offer to the workplace; what the process would be and how it would work. (individual needs assessment *I* program development / delivery / evaluation)

3. Benefits of what you are offering for both workers and management. (how it can address needs that have come out of the DNA)

4. Question and Answer.

Working through the Workplace Literacy Process: A Workshop for Delivery Agencies

Tips for Making Presentations to the Workplace

1. Keep it short and sweet.
2. Use clear language.
3. Always consider the implications for workers and management.
4. Focus on flexibility.
5. Focus on their needs rather than your programs and services.
6. Use other relevant experience to illustrate your track record even if you don’t have workplace experience.
7. Be prepared to answer their questions.
8. Don't over promise.

Working through the Workplace Literacy Process: A Workshop for Delivery Agencies

What Goes into a Workplace Proposal for Provider Services?

1. Introduction including purpose of proposal and about your organization

2. Overall approach to the service or program provided

3. Work plan with the sequence of activities and tasks and timeframes.

4. Budget-- a breakdown of costs

The Components of the Training/Individual Needs Assessment

You have been asked to develop a Workplace Communications and Computer Training Program that will include understanding the paperwork better and completing several short written reports directly on to the computer for workers on the plant floor of a food processing factory. This is an area that came out of the ONA where the company wants to do some training. There are potentially 20 people who have signed up from the plant floor. Many people have little or no experience with computers and some may need to enhance their reading and writing. Some are lead hands and supervisors. Some are speakers of other languages. There is amount of discomfort and fear about computers although people would like to know them to keep up with their children.

A. What would you do as part of your training/individual needs assessment?

B. Look at the initial assessment process used by the Wellington County Learning Centre (or your own if you have brought it with you). What parts could you use for individuals for this program? What parts would you delete? What new additions would you make? Ensure that it is tailored to this situation and can be done in 20 minutes.

C. The company also want you to team teach with the quality coordinator during the workplace orientation (all new employees) and with the WHMIS trainer (all employees take this training) to ensure that participants understand what is going on and take principles of adult education are followed. What kind of assessment would you do to prepare to help?

Planning For program Delivery

Examine the following summaries that have come about as a result of a training/individual needs assessment. Prepare goals and objectives for your program, a brief outline for your program and what you would do during the first two hours with participants. Think about how the workplace situation is the same or different from what you already do. Present your plan to the whole group.

Situation A: Basic Math

You will be teaching a basic Math course with 12 people from different parts of the workplace. The program is offered on 50/50 time so that half the course will be workplace-related and the other half will address participants' personal needs. Management would like people to have more learning with respect to figuring out and plotting averages as part of their quality program. People have already had some training with the company's engineer but felt traumatized because the language was too high and they didn't understand it. The trainer used a presentation style and read out of a handbook. There was little practice except when he called on people to answer a question.

Participants have said they would like to figure out math to do with banking, investments, mortgages, their annual vacation, and helping their children with homework. The course will be 16 hours--4 hours a week over 4 weeks.

Situation B:

You have been asked to develop a Workplace Communications and Computer Training Program that will include understanding the paperwork better and completing several short written reports directly on to the computer for workers on the plant floor of a food processing factory. This is an area that came out of the DNA where the company wants to do some training. There are potentially 20 people, a culturally and racially mixed group, who have signed up from the plant floor. The program will be offered two times a week, 2 hour at a time for 5 weeks. Many people have little or no experience with computers and some may need to enhance their reading and writing. Some are lead hands and supervisors. Some are speakers of other languages. There is amount of discomfort and fear about computers and job loss if they don't learn them: although people said in the DNA that they would like to know them to keep up with their children.

Situation C

Company X wants to offer clear business writing for its office staff as well as protocols for e-mail which is relatively new to the company. The 10 participants, mostly women, will be from reception, marketing and sales administration, accounts payable and receivable and human resources. They have to write memos, letters, and short reports internally and to customers about products they order--some of this bye-mail. They have said that they want to be able to write without stewing for days and days about what they are going to write about and have more confidence. They want to know about "correct" ways to use e-mail--how formal or informal they should be--how much detail, not enough detail.

The Role of the Workplace Educator

The participatory model is welcome in few workplace settings. Practitioners are often only able to weave it in, intermittently, with more traditional approaches. But this is true outside of workplace education as well, even though the language of "empowerment" and "student directedness" is everywhere. Adult education is generally oriented to preparing people to uncritically participate in the current work, school and political systems. Many argue that this is what adults say they want. Participatory education WIJ/ continue to ask deeper questions to find out if this is all they really want.

Nash, A. (2001). Participatory workplace education: Resisting fear driven models. In P. Campbell & B. Burnaby (Eds.). *Participatory practices in adult education* (pp. 185-195). New Jersey: Lawrence Erlbaum.

In small groups discuss the statement above. Do you agree or disagree with it? Then discuss the following points that Nash also makes:

Given the delicate context we are working in, we can apply the participatory approach in the following ways:

1. Use very opportunity to explore how the workplace runs and how it affects our lives. Investigate the ordinary by asking questions like:
   - How is information shared here? (official and unofficial ways)
   - What's a good job here?
   - Make a map of the workplace.

2. Seek to understand and make connections between individual concerns and the larger context.

3. Use the participatory approach flexibly, try to carry forth its purpose rather than it method. Getting to explicit public action is not as important is not as central as developing a depth of understanding that can support informed action whenever it becomes appropriate.

4. Prioritize worker goals to learn concrete skills. Articulate the skills they are learning during non-traditional lessons.

Checklist

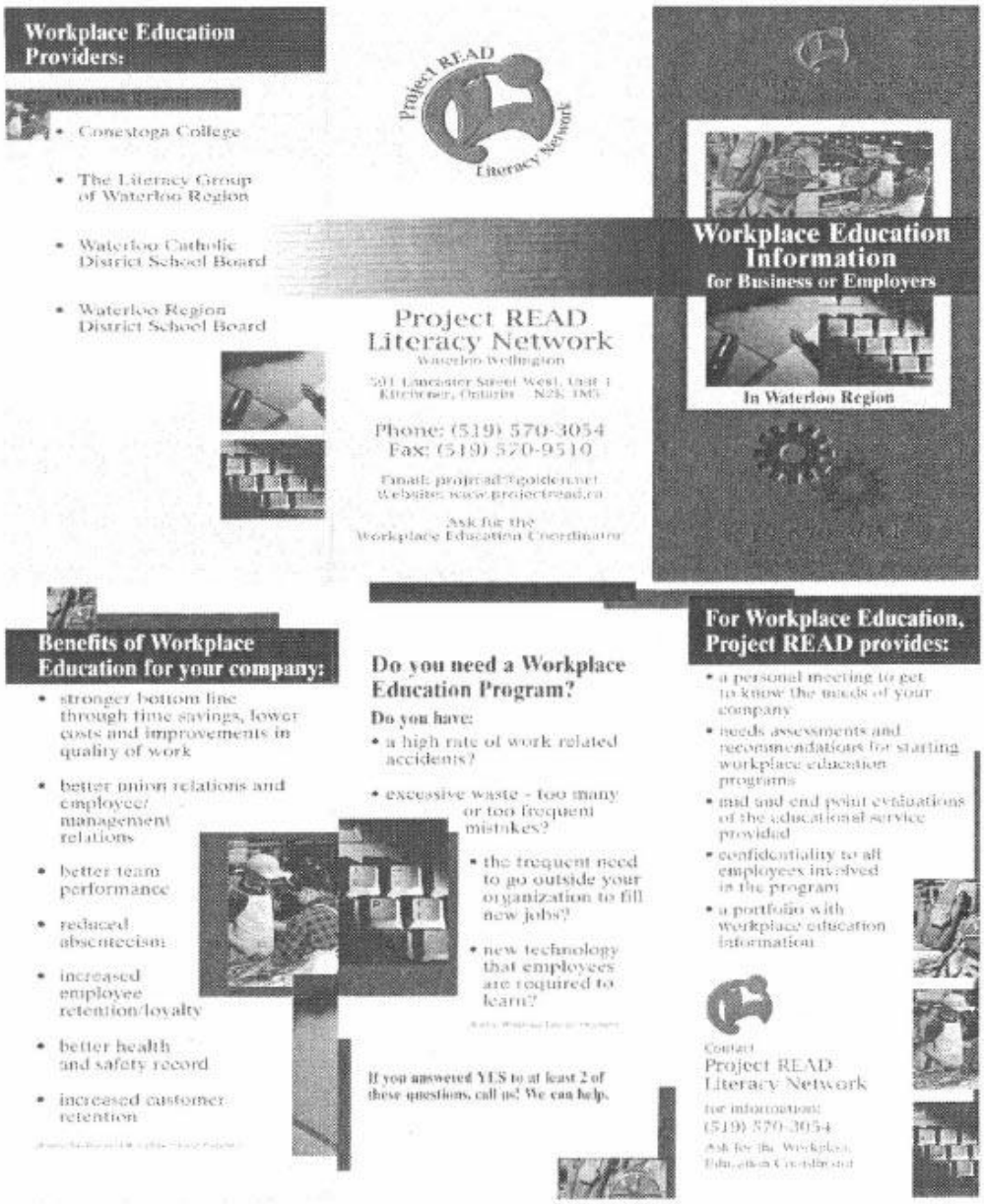
Workplace materials (from management and union)

Print

- ❑ site maps and plans
- ❑ advertising brochures
- ❑ posters
- ❑ employee handbooks (history of the organization, regulations, etc.)
- ❑ benefit plans
- ❑ health and safety manuals
- ❑ training manuals
- ❑ fire regulations
- ❑ payroll slips
- ❑ newsletters, newspapers
- ❑ job descriptions
- ❑ instructions for operating equipment
- ❑ descriptions of other procedures or processes used in the workplace
- ❑ job-specific written materials (forms, memos, menus, code books)
- ❑ annual reports
- ❑ Audio, video, and other sources
- ❑ presentations for orientation, staff development, on-the-job training
- ❑ advertising
- ❑ staff meetings - you could be an observer or participant
- ❑ employee presentations to groups
- ❑ job-specific presentations - given by or for learners in the workplace

Appendix Four:
Marketing Materials

Brochure for Employers/Business



Workplace Education Providers:

- Conestoga College
- The Literacy Group of Waterloo Region
- Waterloo Catholic District School Board
- Waterloo Region District School Board

Project READ Literacy Network

Waterloo-Wellington

501 Lancaster Street West, Unit 1
Kitchener, Ontario N2K 1M5

Phone: (519) 570-3054
Fax: (519) 570-9510

Email: projread@golden.net
Website: www.projectread.ca

Ask for the Workplace Education Coordinator

Workplace Education Information
for Business or Employers

In Waterloo Region

Benefits of Workplace Education for your company:

- stronger bottom line through time savings, lower costs and improvements in quality of work
- better union relations and employee/management relations
- better team performance
- reduced absenteeism
- increased employee retention/loyalty
- better health and safety record
- increased customer retention

Do you need a Workplace Education Program?

Do you have:

- a high rate of work related accidents?
- excessive waste - too many or too frequent mistakes?
- the frequent need to go outside your organization to fill new jobs?
- new technology that employees are required to learn?

If you answered YES to at least 2 of these questions, call us! We can help.

For Workplace Education, Project READ provides:

- a personal meeting to get to know the needs of your company
- needs assessments and recommendations for starting workplace education programs
- mid and end point evaluations of the educational service provided
- confidentiality to all employees involved in the program
- a portfolio with workplace education information

Contact
Project READ
Literacy Network
for information:
(519) 570-3054
Ask for the Workplace Education Coordinator

Quick Facts Sheet

Workplace Education Quick Facts

1 out of 3J Canadian employers experience basic skills-related problems with their workforce, yet less than 1 out of 10 employers are involved in literacy programs or referrals to programs

The Impact of Basic Skills Programs on Canadian Workplace, by the Workplace Education Center of ABC CANADA. reports on 86 employer and employee representatives from 53 workplaces which had participated in basic skills training for at least 1 year:

- 79% reported increased productivity
- 84% reported improvements in the quality of people's work
- 73% reported an increase in the work effort
- 87% reported more competent use of workplace based technology
- 82% reported increased health and safety
- 97% reported increased self confidence that benefits the workplace

When 600 managers from a broad spectrum of Canadian industry were surveyed in 1992, about l/3 of them reported that poor literacy caused serious difficulty with:

- introducing new technology
- product quality
- productivity

The estimated annual cost of low literacy to Canadian business is $1.6 billion fur industrial accidents alone. This does not include the cost of illiteracy from lost productivity in other areas, ,

The Allcn-Bradlev Corporation, maker of programmable controllers, found that customer service calls shifted from 50 calls a day to 2 calls a month after they redesigned their documents using plain language and readable formats .

How do I know (for employers)… ?

How do I know if my Employees would benefit from an Employee Development Program?

If you have contacted Project READ Literacy Network, or another provider. chances are you know there is a need in your company for employees to enhance their skills. However. there isn't a specific test or questionnaire to identify all educational and upgrading needs. here are some dues that you should watch for in employees.

Writing Clues

Employees:

- take reports home to complete
- get coworkers to fill out forms
- have trouble filling out a time sheet
- have trouble with grammar and spelling
- have trouble expressing themselves in writing
- written messages are difficult to understand

Reading Clues

Employees:

- do not follow written instructions correctly
- have not read the safety manual
- get hurt even though there are signs indicating danger
- mix chemicals together that should not be mixed
- say they forgot their glasses to get others to read for them

General Clues

Employees:

- have expressed an interest in employee development in the past
- do not participate in meetings
- are worried about t he implementation of computers in their specific jobs
- are nervous about being trained in new equipment
- have been employed in the same position for the past 20 years and have not made any indication that they would like to advance.

Flowchart for setting up employee program

Setting up an Employee Development Program?

This is what YOU, as a company, can do to set up an employee development program

1. Call Project READ or a workplace provider to set up an information meeting.
2. Determine if management supervisors, union, and employees are supportive.
3. Form a workplace planning committee with representative from management, supervisors, union & employees.
4. Do a workplace needs assessment to determine what is best for your company.
5. Workplace planning committee sets goals, objectives and action plans based on the results of the needs assessment
6. What do employees want and need in a workplace education program?
   What is the interest level to attend a workplace program?
7. Work with the provider to develop the programs to implement along with the necessary curriculum.
8. Work with the provider to develop evaluations for the programs - outcomes and benchmarks of success.
9. Implement the programs that were created
10. Work with the provider to evaluate programs individually as part of the workplace program.
11. Work with the provider to develop action plans to implement the results of evaluations.
12. Start again with the next program

Brochures for Unions and Workers (note that each region requested their own brochures for each of the 3 separate brochures)

Workplace Education Providers:

- Action READ
- Conestoga College
- Wellington Centre for Continuing Education (Upper Grand District School Board)

- Conestoga College
- Wellington Centre for Continuing Education (Upper Grand District School Board)
- Wellington County Learning Centre

Project READ Literacy Network

Project READ Literacy Network
Guelph-Wellington

591 Lancaster Street West, Unit 4
Kitchener, Ontario N2K 1M5

Phone: (519) 836-7164
Fax: (519) 570-9510

Email: project@gtelmail.net
Website: www.projectread.ca

Ask for the
Workplace Education Coordinator

Workplace Education Information
for Unions

In Guelph & Wellington County

Benefits of Workplace Education for your Union Members:

- practice reading, comprehending and using written materials including graphs & charts in their job
- opportunity to upgrade skills to change jobs within the company
- opportunity to continue to learn for life
- increased self esteem
- increased employee retention/loyalty
- practice setting goals in work and personal life
- practice team building and communication skills

Do you need a Workplace Education Program?

Do you have:

- a high rate of work related accident claims?
- members who do not take advantage of job postings due to their educational background?
- lots of referrals to outside literacy organizations for your members?
- lots of revised job descriptions or new technology?

If you answered YES to at least 2 of these questions, call us! We can help.

For Workplace Education, Project READ provides:

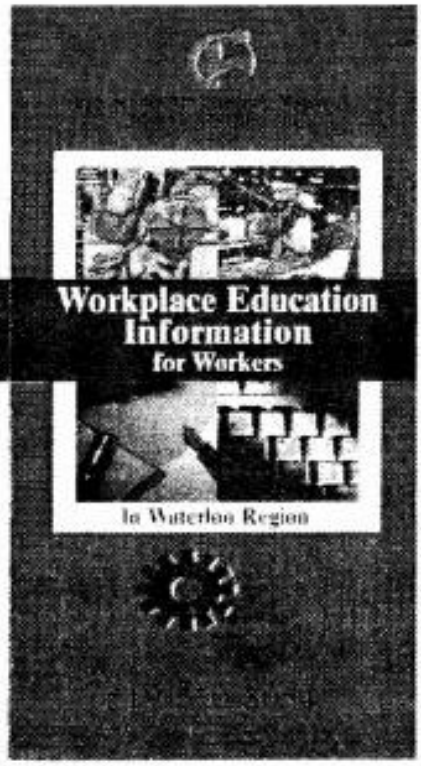
- a personal meeting to get to know the needs of your company
- needs assessments and recommendations for starting workplace education programs
- mid and end point evaluations of the educational service provided
- confidentiality to all employees involved in the program
- a portfolio with workplace education information

Contact
Project READ
Literacy Network
for information:
(519) 836-7164
Ask for the Workplace
Education Coordinator

Learning is for life!

Project READ Literacy Network

Phone: (519) 570-3074
Fax: (519) 570-9540



Why Should I Join?

- to get more practice communicating with your co-workers and bosses
- to get better at reading work memos
- to get better at writing shift reports
- to get better at understanding safety rules
- to get better at managing your time

Can I Go?

Yes, if:

- you want to do better at your job
- you want to improve your reading, writing and math skills for work
- you work in any department of the company
- you are able to do class work on your own time

Cost? $$$

- there is no cost to join a class
- you may have to pay for your books or materials (pens, paper)

Contact
Project READ
Literacy Network

for information:
(519) 570-3074

Ask for the Workplace Education Coordinator

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Wellington County Literacy Centre 6

Wellington County Learning Centre

124B George Street, Arthur, Ontario N0G 1A0
Phone: 519 848 3462 Toll Free: 1800 368 7889
Fax: 519 848 9354
Contact: Lindsay Kennedy
Email: literacy@freespace.net

Services offered in the workplace:

- One to one tutoring
- Small group - computer basics on company site (groups of 4 students for 4 weeks)
- Customized as necessary
- Needs Assessment
- Program evaluations

Times: See Quick Reference Page **Availability:** All year

Location: On or Off company site **Fees:** $60.00 per hour

Benefits of Program:

- Confidentiality
- Individual tutoring - less intimidating/more flexible
- Service can be provided on site adapting to workplace needs (ie: shift schedules)

Approximate Time to Set Up:

- Depends on program (ie: offer quarterly training to employees who want to tutor their co-workers)

Choosing a Workplace Education Provider:

What to look for!

It is very important to take the following points into consideration BEFORE choosing a provider. Feel free to contact more than one provider. You can also use Project READ Literacy Network as a resource for an objective recommendation, based on the documented needs of your company.

- Will the provider offer to help you to develop a long term strategy that involves a thorough needs assessment?
- Will the provider work well with adults at all levels of your organization in a way that respects their dignity and makes them feel comfortable?
- Will the provider tailor the needs assessment as well as the design, development and delivery of programs to your workplace and the needs of your employees?
- Is the provider willing to work collaboratively throughout the process with the union, management, employees and other interest groups?
- Does the provider understand the different issues and goals of your company?
- Does the provider offer programming at the times and locations that meet your needs?
- Does the provider offer a variety of alternative program models and strategies to address basic skills?

Quick Reference Page:

	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
PAGE NO.	4	6	7	8	6	7	8
FEES							
Fee for Service	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PROGRAMS OFFERED							
Basic literacy skills	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Customized programs	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Basic Computer Skills (ie. copy, paste)	Yes	Yes	Yes	Yes*	Yes	Yes	Yes
SET UP							
1-1 peer	No	Yes	No	No	Yes	No	Yes
Small Group (7-8)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Classroom (8 plus)	No	No	Yes	Yes	No	Yes	No
WHO PROVIDES SERVICES							
Employees peer tutor	No	Yes	No	No	Yes	No	Yes
Community Volunteer Tutors	No	No	No	Yes	Yes	No	Yes
Teachers	Yes	Yes	Yes	Yes	No	No	Yes
LOCATION							
Provider site	Yes	Yes	Yes	If needed, yes	Yes	Yes	Yes
Company site	Yes	Yes	Yes	Yes	Yes	Yes	Yes
TIME FRAMES							
All Year	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Mornings	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Afternoons	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Evenings	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Weekends	Yes	Yes	Yes	Yes	No	Yes	Yes
Shift schedules	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Conestoga College

299 Doon Valley Drive, Kitchener, Ontario N2G 4M4
Phone: 519 848 5220 x 412 Fax: 519 748 3521
Contact: Deborah Weickert
Email: dweickert@conestogac.on.ca

Services offered in the workplace:

- Groups of 6-20 people
- Academic upgrading pre-assessment
- Academic upgrading
- Customization as necessary
- Needs Assessment
- Program evaluations

Times: See Quick Reference Page

Availability: All year

Location: On or Off company site

Fees: Varies depending on services

Benefits of Program:

- Solid links to further and diverse training opportunities including higher level academic upgrading, GED testing, and Conestoga's numerous skill training programs

Approximate Time to Set Up:

- Three weeks

The Literacy Group

133 Frederick Street, Kitchener, Ontario N2H 2M1
Phone: 519 743 6090 Fax: 519 743 0474
Contact: Program Coordinator
Email: read1@golden.net

Services offered in the workplace:

- Train peer tutors within the organization and provide ongoing support for contracted period of time
- Small group and one-to-one training programs
- Additional one-to-one support through partnerships with primary service providers
- Services such as company needs assessments, individual employee needs assessments, and curriculum development are also available in order to create customized programs
- Program evaluations

Times: See Quick Reference Page

Availability: All year

Location: On or Off company site

Fees: Varies depending on services

Benefits of Program:

- Student confidentiality
- Years of experience developing and supporting one-to-one and small group programs
- Peer-tutoring situations make students feel more comfortable as they are getting help from a co-worker who relates to their work situation and needs
- Small group students can support each other both on and off the job, creating a team environment

Approximate time to Set Up:

- 3-4 weeks after the completion of the Needs Assessment (may vary depending on the results of the Assessment)

Waterloo Catholic District School Board St. Louis Centre for Training & Development

26 Cooper Street, Cambridge, Ontario N3C 2N2
Phone: 519 651 2020 Fax: 519 651 1987
Contact: Gina Pagliaroli
Email: gina.pagliaroli@wcdsb.edu.on.ca

Services offered in the workplace:

- Small/large group instruction
- Workplace specific training
  - customized curriculum
- Creative and varied delivery
- On site Needs Assessment
- Program evaluations
- Computer literacy, communication skills, presentation skills etc.

Times: See Quick Reference Page

Availability: All year

Location: On or Off company site

Fees: Varies depending on services

Benefits of Program:

- Proven experience in workplace education working with senior professionals (ie: high-end English language training, soft skills training, computer training etc.) and with low skilled employees (ie: job search, computer literacy etc.) in unionized and non-unionized settings
- Sensitive, professional and responsive instructors
- Flexible delivery and comprehensive service
  - recognized in the community for long term delivery of high quality programming and services

Approximate Time to Set Up:

- 1-2 weeks to set up, but may be longer depending on program and requirements

Waterloo Region District School Board

51 Ardelt Street, Kitchener, Ontario N2C 2E1
Phone: 519 570 0003 x 4462 Fax: 519 740 7362
Contact: Mary Adamson
Email: mary_adamson@wrdsb.edu.on.ca

Services offered in the workplace:

- Small group (2-8 people)
- Large group (9+ people)
- Academic preparation
- Customization as necessary
- Needs Assessment
- Program evaluations

Times: See Quick Reference Page (will accommodate shift work)

Availability: All year

Location: On company site

Fees: Varies depending on services

Benefits of Program:

- Years of experience offering services in the workplace (on site) in Waterloo region
- Experience working in unionized and non-unionized environments
  - Qualified instructors able to adapt to specific needs of employees in the programs

Approximate time to Set Up:

- 1-2 weeks depending on program requirements and customization

Action Read Community Literacy Centre

2 Quebec Street, Suite 220, Guelph, Ontario N2C 2E1
Phone: 519 836 2759 Fax: 519 836 7020
Contact: Anne Moore
Email: actionr@golden.net
Website: www.home-golden.net/~actionr

Services offered in the workplace:

- One to one tutoring
- Small groups
- Individualized upgrading plans
- Small group computer tutoring
- Assessments and evaluations
- Customization as necessary
- Needs Assessment
- Program evaluations

Times: See Quick Reference Page

Availability: All year

Location: On company site

Fees: $60.00 per hour (may vary depending on service)

Benefits of Program:

- Flexible program
- Confidential
- Customized programs

Approximate time to Set Up:

- One month lead time, but may depend on program.

Wellington Centre for Continuing Education

66 Norfolk Street, Guelph, Ontario N1H 4H8
Phone: 519 836 7281 x 617 Fax: 519 837 0244
Contact: Murray Shannon

Services offered in the workplace:

- Small group (2-8 people)
- Large groups (9+ people)
- Customization as necessary
- Needs Assessment
- Program evaluations

Times: See Quick Reference Page

Availability: All year

Location: On or Off company site

Fees: Varying depending on services.

Benefits of Program:

- Flexibility of program delivery
- Small and large groups
- Offered in combinations of other educational programs
  - Guelph and Wellington County

Approximate Time to Set Up:

- Variable, depending upon the program required

Sample Memo

MEMO TO ALL EMPLOYEES

(Insert company name) is offering courses to help you get better at reading, writing, math and computers.

Do you want to be better at:

- **communicating with your co-workers**
- **understanding work memos**
- **writing shift reports**
- **understanding safety rules**
- **learning new things to help you do your job better**

SAMPLE

PHONE SCRIPTS FOR WORKPLACE
HOT CONTACT

Good morning/afternoon/evening <insert their name>. I'm _____ and I'm calling from Project READ literacy network. I was given your name by _____, who thought you maybe interested in our services.

OR

We met at <name the organization or event> and we had briefly discussed the services my organization provides. You may remember that we're a not ...<continue with the point in the script>.

You may have heard of us we're a **not for profit** literacy umbrella organization representing all literacy providers in Waterloo/Wellington. Our providers have over 20 years of experience in providing adult basic education and training in basic . skills and we're now offering this service to the workplace.

What we would like to do is mail you out a package of our informational materials for you to peruse. Would that be okay?

IF YES:
Great!!! I'll get that out in the mail today for you and follow up with you on <day of the week 3 to 5 days from now>.

Thank you for taking the time to speak with me and to review our package, I'm sure you'll be interested in further information once you've read it. Have a wonderful day.

IF NO:
Would it be better if I hand delivered it?

IF STILL NO:
I can understand you don't want more paper to recycle in your office, but I do think your company would benefit from the services we are offering. Even if just to rewrite materials into clear language which can lower customer service questions or assist you in meeting ISO standards.

IF STILL NO AGAIN:
Thank you for your time, I hope we can perhaps be of service to you in the future. Have a wonderful day.

SAMPLE

PHONE SCRIPTS FOR WORKPLACE
COLD CALL

Good morning/afternoon/evening <insert their name>. I'm _____ and I'm calling from Project READ literacy network. You may have heard of us we're a not for profit literacy umbrella organization representing all literacy providers in Waterloo/Wellington. Our providers have over 20 years of experience in providing adult basic education and training in basic skills and we're now offering this service to the workplace.

What we would like to do is mail you out a package of our informational materials for you to peruse. Would that be okay?

IF YES:
Great!!! I'll get that out in the mail today for you and follow up with you on <day of the week 3 to 5 days from now>.

Thank you for taking the time to speak with me and to review our package, I'm sure you'll be interested in further information once you've read it. Have a wonderful day.

IF NO:
Would it be better if I hand delivered it?

IF STILL NO:
I can understand you don't want more paper to recycle in your office, but I do think your company would benefit from the services we are offering. Even if just to rewrite materials into clear language which can lower customer service questions or assist you in meeting ISO standards.

IF STILL NO AGAIN:
Thank you for your time, I hope we can perhaps be of service to you in the future. Have a wonderful day.

SAMPLE

PHONE SCRIPTS FOR WORKPLACE
FOLLOW-UP

Good morning/afternoon/evening <insert their name>. It's _____ from Project READ calling, following up on that information package I sent you. Did you receive it?

IF YES:
Do you have any questions in regards to the materials in the package? I would like to make an appointment with you, it will only take 15 minutes of your time to further discuss the services we provide. How is <have two dates ready, morning or afternoon>?

IF TIMES ARE UNSUITABLE:
When would be a good and convenient time for you to meet with me then? Wonderful!!! I'll see you at <repeat the appointment date and time> and look forward to discussing our services in more detail. Have a great day!

SAMPLE
Cover letter to business with marketing package

<name of contact>
<company name>
<street address>
<city, province>
<postal code>

Dear
Some of the most common responses from participants in workplace education are: "I've learned how to communicate more effectively" and "I've learned to listen better". These are two statements everyone wants to hear said in their company. Communication is the key to success and that's why Project READ Literacy Network and its members are offering the basic skills services to the workplace in our community.

As a not for profit organization we are offering an Organizational Needs Assessment which will identify training needs within your company and clear writing needs for internal and external documents. We will also identify the best workplace program for your needs in the community. All companies can benefit from clear writing. For example, Cambridge Hydro has a program entitled Share the Warmth and for the first couple of years it had no responses. Unbelievable, they're offering a service to assist people in paying for utilities through the winter and no one responded? For the third year, we rewrote their brochure into clear language and suddenly they received over 50 responses. Clear communication is the answer. To acquire clear communication throughout your company though you need to ensure that everyone can communicate in the same way .. .language, low reading skills, low writing skills and general low communication skills can impede your potential.

After reviewing all the materials in this folder, you will be interested in having your company's needs addressed, which we can discuss when I call you in a few days.

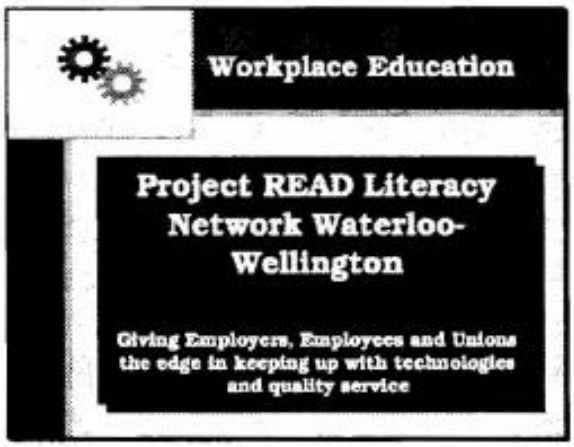
With regard,

Jane Tuer
Executive Administrator

SAMPLE

POWERPOINT PRESENTATION FOR MARKETING

Slide 1



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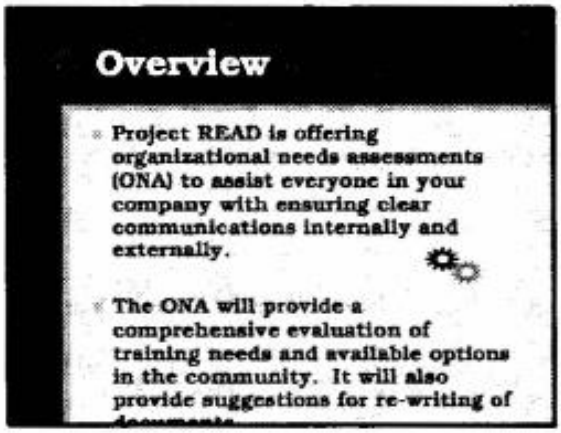

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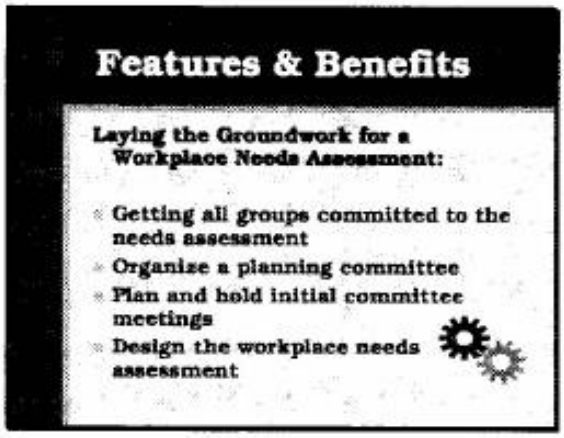

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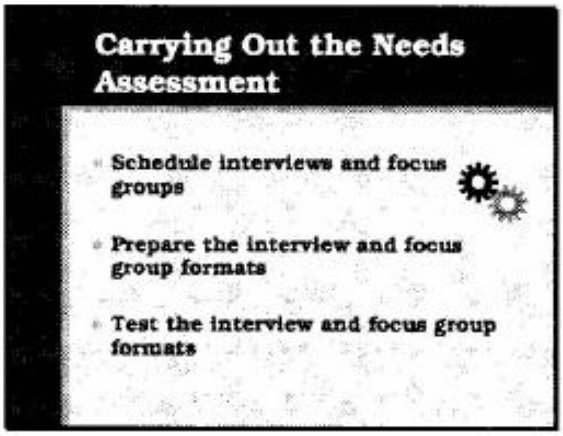

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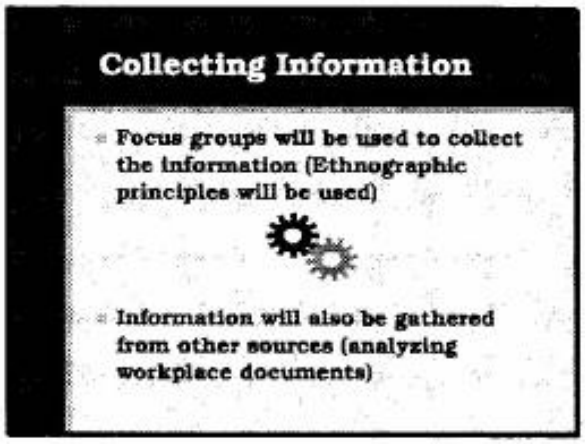

Slide 6

Interpreting and Reporting

- Meeting the needs of the organization, the employee and the job
- Writing an executive summary of findings
- Creating a potential action plan
- Reporting the findings

Slide 7

Applications

- The ONA will give be useful to everyone within the company.
- Using focus groups we will determine what training needs exist and what kind of training is required.
- We will also be able to review sample documents, internal and external for clear writing.
- *At Allen-Bradley, when customer documents were rewritten into clear language, customer service calls decreased from 50 calls per day to 2 per month*

Slide 8

Specifications

- In order for an ONA to be successful we will require input from all aspects of the company, including: management, supervisors, laborers and office staff.
- Using focus groups and asking key questions, we will be able to make clear recommendations on training needs based on the outcomes.
- To assess documents for clear-writing, we will need a few samples to review.

Slide 9

Pricing

- If you are located in Cambridge, North Cambridge Rotary will help to supplement the costs of an ONA and training.
- Clear writing is based on a fee of $50/hour (for example a 35 page PowerPoint presentation has taken 3 1/2 hours)
- The regular costs of an ONA are kept to a minimal:
  - up to 50 employees $250
  - 51 to 100 employees $300
  - 101 to 150 employees $350
  - 151 to 200 employees $400
  - 201 to 250 employees $450
  - over 250 employees $500

Slide 10

Availability

- An ONA can be done at any time convenient to you
- We are flexible to meet your needs.
- The training that we will recommend can be done on-site or in another location and will be provided by the training expertise of our members, as listed in our brochure.

Appendix Five
Proposals and Contracts

Proposal to Develop a Series of Clear Language Workshops for Company ABC

Prepared by:

Educational Organizatior X

March, 1999

I. Introduction

a. Purpose of Proposal

The purpose of this proposal is to present a project plan for developing a series of clear language workshops for Company ABC. We understand that the daylong workshop will be run three times with a maximum of 12 participants in each workshop. The goals of the company in offering these workshops are:

- to ensure that technical personnel, supervisors and managers write using principles of clear writing and design to improve everyone's understanding of workplace written communication and e-mail communication
- to develop a systematic process for clear writing to be followed by everyone in the company who writes workplace documents and corresponds bye-mail.
- to improve written communication and understanding of it in Company ABC

b. The Approach

Educational Organization X will use a collaborative approach to develop the clear language workshops. The Plan will be based on an individual needs assessment with participants and will consider the clear language issues that came out of the ONA. We will work closely with the Joint Training Committee to understand the issues in more detail. The workshops will be tailored to Company X through this process.

The Clear Language Writing Workshops will include:

- what makes reading and understanding difficult at Company X
- the impact on lack of understanding on the company and individuals
- the principles of clear language and design: step by step
- putting the principles into practice using participants' own pieces of writing
- next steps towards developing a company clear language policy

II. About Educational Organization X

Educational Organization X focuses on the development of foundation skills like reading, writing, basic computers and math to the public and private sectors. We have been delivering clear language workshops in the region for the last 10 years. Here's what other organizations say about our work:

XXX

II. Recommended Work Plan

We recommend that the Clear Language Workshops be developed according to the following steps.

a. Step 1: Consult with Client (April 1999)

In Step 1, we would like to meet with our key contact and the Training Committee to clarify 1) the scope of the project, 2) client needs, and 3) clear language issues that came out of the company's ONA. This consultation will provide solid preparation for the next steps.

b. Step 2: Develop Individual Training Needs Assessment Strategy (April 1999)

In Step 2, we will develop a needs assessment tool and plan in consultation with the client. One major purpose of the needs assessment is to collect information from workshop participants and other on the difficulties with written communication and workplace materials.

c. Step 3: Conduct Individual/Training Needs Assessment (May 1999)

We will conduct interviews with workshop participants and collect information according to an agreed-upon needs assessment plan with the client. We will develop an outline for the Clear Writing Workshop based on these findings and present it to the Training Committee for final approval.

d. Step 4: Design and Deliver Clear Writing Workshop (June 1999)

We will develop the workshop based on the approved outline. We will pilot the workshop with the Training Committee and other key contacts and adjust the workshop accordingly for the rest of the series. Participants will be asked to complete an evaluation form at the end of the workshop. These results will be summarized in a final report for the Company.

e. Step 5: Follow-up Meeting with Client (July 1999)

We will follow up with the client to review the project process and ensure that there has been satisfaction with the project.

V. Budget

1. Plan and Conduct Individual Training Needs Assessment:
40 hours @ $50. = $ 2000

2. Develop and Deliver 3 workshops for 36 people:

- Development and Preparation: 40 hours @ $50. = $ 2000
- Deliver Workshops 24 hour~ @ $50. = $ 1200

3. Write Final Report: 15 hours @ $50. = $ 750.

Total Cost: $ 5950.
Plus GST.

Subject: Contract for your Acceptance (bye-mail)

February 28, 2001

To: **Jane Doe, Literacy Consultant**

From: Name of Client

Dear Jane,

This letter will outline the terms of your contract to prepare a report on XX.

Time period: up to 10 days between March 1 - March 3112001

Fees: $XX per day

Objective: ***insert a brief outline of the objective for your training (i.e. clear language or specific training of employees).*** **The content should include:** ***-make brief point-formed outlines of what will be done.***

Jane, I think this report will be a very useful document, and I'm very happy that you have agreed to take this on. Please confirm by return e-mail.

Name of Client
Title of Client
Organization

Letter of Agreement Between *Literacy Organization Giving Training (LOG Training)* and *Workplace/Company Recipient of Training (W/C RT)*

- **Statement of Work:** The project will include the development and delivery of a basic math course with a focus on metric conversion and measurement for 12 participants, 4 hours a week for 3 weeks. There will be two groups, one for day shift and the other on the midnight shift. The day shift program will operate from 6 a.m. - 8 a.m. every Tuesday and Thursday. The midnight shift program will operate from 11 p.m. - 1 a.m. every Monday and Friday. Each participant will receive a 20 minute, confidential individual assessment. The instructor will present aggregate reports to the joint committee twice during the course of the program. The delivery organization will prepare a final evaluation report .

- **Time Frames:** The two groups will run between April 15 and May 7th , 2001. The individual needs assessments will be conducted the first week of April. The final report will be due two weeks after the last class.

- **Fees:** Fee associated with the development, delivery and evaluation of the program will be paid in four equal installments at the completion of each component as follows:

Individual Needs Assessment:	24 hours x $50. = $1200.
Program Development:	40 hours x $50. = $ 2000.
Program Delivery:	24 hours x $50. = $ 1200.
Meetings, Evaluation and Final Report 24 hours x	$50.= $ 1200
TOTAL:	**$5600 plus GST.**

Signature of W/C RT

RT Signature of LOG Training

_____

_____

April 2001

John Smith
XXZV Company
Everytown, ON

Dear John,

As per my conversation with **Jane Doe**, I am submitting the enclosed proposal. My understanding of what the committee wants to offer XXZY Company is as follows:

- to provide a basic computer course for up to 60 employees;
- up to 12 employees can access the training each time the course is offered;
- to accommodate shift schedules, each course will provide three 2-hour sessions a week for 4 weeks;
- there will be a maximum of 4 employees per each 2-hour session;
- assessment and training plan development will take a maximum of thirty minutes
- the S.O.L. committee is interested in participating in the hiring process for the course instructor.

The first offering of the course is slight more expensive than each additional course. This reflects my assumption that start-up materials and course content should remain relatively unchanged once developed (allowing of course for individual needs). Also, the cost per course offering includes all materials with the exception of work related materials which course participants may wish to supply.

I really enjoyed meeting with you and the rest of the committee. I'm pleased that you felt can provide you with the training that the employees have indicated an interest in receiving. I am hopeful that we can start the first computer basics course before mid-March. Please call me if you have any questions or need more information.

First Four Week Course

OBJECTIVE: To provide 12 XXZY Company employees with one-to-one basic computer training.			
Session times	6:00am - 8:00am	2:00pm - 4:00pm	10:00pm- 12:00am
# of Participants	4	4	4
Assessment & Training Plan Development	30 minutes (max) per participant	30 minutes (max) per participant	30 minutes (max) per participant
Program Delivery	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks
Cost per Shift	$1,350	$1,350	$1,350
		Total Cost, first course	**$4,050**

Each Additional Course

OBJECTIVE: To provide 12 XXZY Company employees with one-to-one basic computer training.			
Session times	6:00am - 8:00am	2:00pm - 4:00pm	10:00pm- 12:00am
# of Participants	4	4	4
Assessment & Training Plan Development	30 minutes (max) per participant	30 minutes (max) per participant	30 minutes (max) per participant
Program Delivery	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks
Cost per Shift	$1,350	$1,350	$1,350
		Total Cost, first course	**$4,050**

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Session times	6:00am - 8:00am	2:00pm - 4:00pm	10:00pm- 12:00am
# of Participants	4	4	4
Assessment & Training Plan Development	30 minutes (max) per participant	30 minutes (max) per participant	30 minutes (max) per participant
Program Delivery	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks
Cost per Shift	$1,200	$1,200	$1,200
		Total Cost, first course	**$3,600**

Each Additional Course

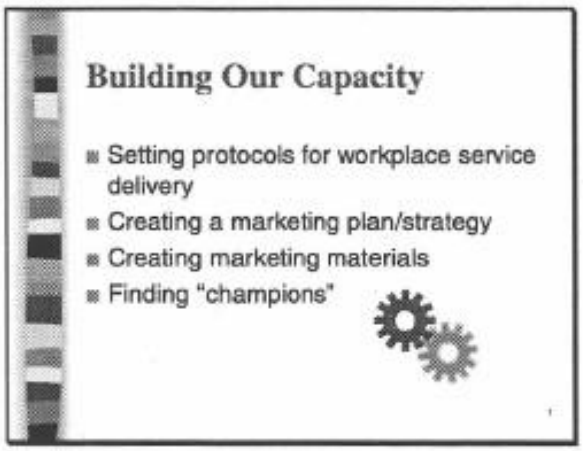
OBJECTIVE: To provide 12 XXZY Company employees with one-to-one basic computer training.			
Session times	6:00am - 8:00am	2:00pm - 4:00pm	10:00pm- 12:00am
# of Participants	4	4	4
Assessment & Training Plan Development	30 minutes (max) per participant	30 minutes (max) per participant	30 minutes (max) per participant
Program Delivery	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks	8 hours total (2 hours per week x 4 weeks
Cost per Shift	$880	$880	$880
		Total Cost, first course	**$2,640**

Scenario One	Scenario Two	Scenario Three
Peer Tutorig – 30 pairs (tutoring training, coordination, volunteer tutors – 6 months)	Stand-up delivery (20 trainees, 20 weeks of training)	Learning Centre (10 station networked lab integrated learning systems, 50 students, 20 hours per week combination workshops and drop-in labs) 6 months
Tutor training - 5 days @ _____ = _____	Needs Assessment - 10 days @_____ = _____	Needs assessment – 3 weeks @ _____ = _____
Instruction – N/C (Volunteer tutors)	Instruction – 6h X 20 weeks 120 hours @ _____ = _____ Preparation, administration, final report – 20 hours @ _____ = _____	Instruction – 10h X 25 weeks 250 hours @ _____ = _____ TA for labs – 10h X 25 weeks 250 hours @ _____ = _____
Coordination – 6 months @ _____ = _____	Supervision @ 15% _____= _____	Project management @ 15%
		Software lease – 6 mos @ 1500 = _____ Technical Installation = _____ Maintainence – 6 mos $50 =_____
Miscellaneous – materials, duplication, telephone, fax, travel, parking	Miscellaneous – materials, duplication, telephone, fax, travel, parking	Miscellaneous – materials, duplication, telephone, fax, travel, parking
Admin overhead ?	Admin overhead ?	Admin overhead ?
Total cost	Total cost	Total cost

Per student cost _____ - 30 = _____	Per student cost _____ - 20 = _____	Per student cost _____ - 50 = _____

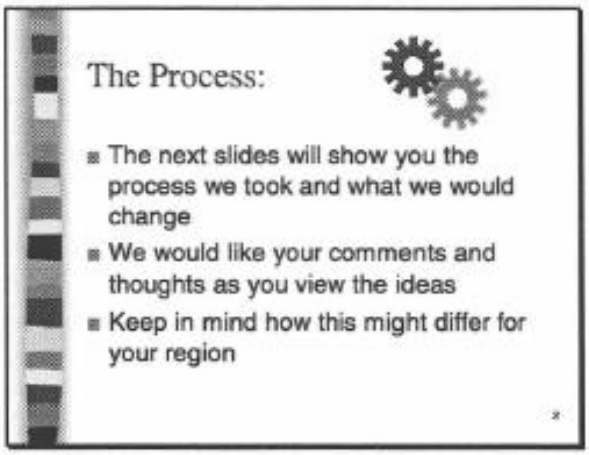
Appendix Six:
Powerpoint Presentation to QUILL Network

Slide 1



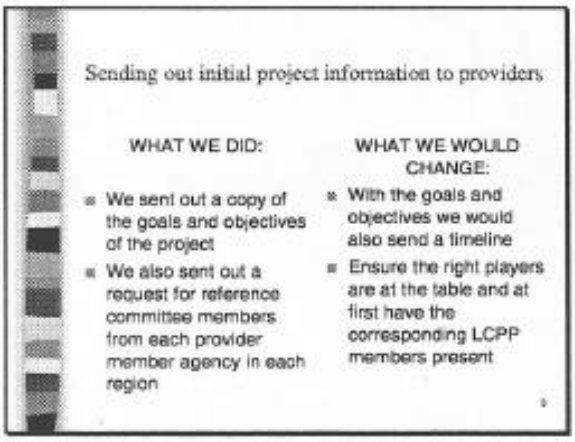
This is what our project covered
Explain champions - I.e. WWTAB, Grocery Producers Council, Rotary, Chamber of Commerce

Slide 2



Encourage questions
Let them know there will be questions we would like some input on at the end of the presentation, they refer to the pre-meeting questions they received from QUILL.

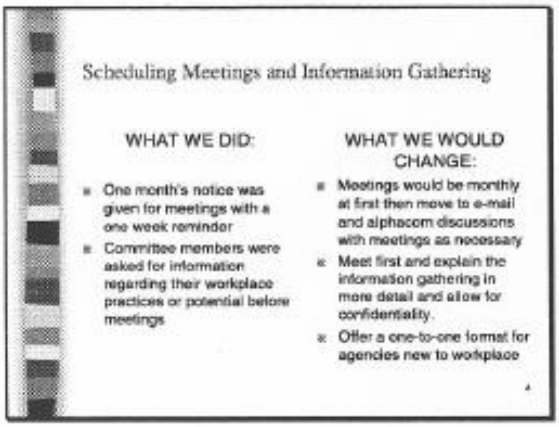
Slide 3



What we did:
-a copy of the original proposal was sent
-reference committee members needed to be the individuals who would make decisions about basic skills training in the workplace

What we would change:
-the timeline would show when we hoped to have each step in place to give the providers time to handle priority needs
-we thought the group would be easy to work with, as they had already developed LSPs together ... however, it wasn't always the same players at the table (I.e. the school boards and the college (who sent just the literacy person)) ... this changed the group dynamics and created an atmosphere of secrecy and distrust. Perhaps an exercise on working together would also help, but you need to have the original LSP players at the table along with their workplace coordinators

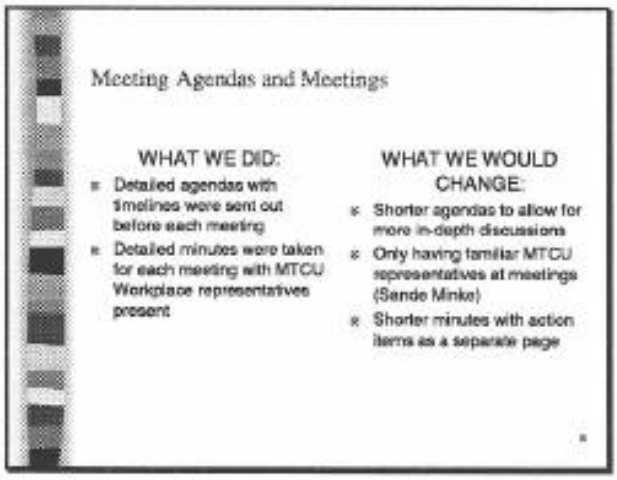
Slide 4



What we did:
-we needed to have more face to face meetings at the beginning and practitioners need to be made aware of this. It's easier to cancel unnecessary meetings than to add more. The reason more were needed at the beginning was the lack of training in workplace and the group dynamics and the feeling of some providers that they had to protect their program's information. We eventually moved more and more to e-mail and alphacom
-the information was gathered via email and fax ... but with little to no response a less intimidating shorter

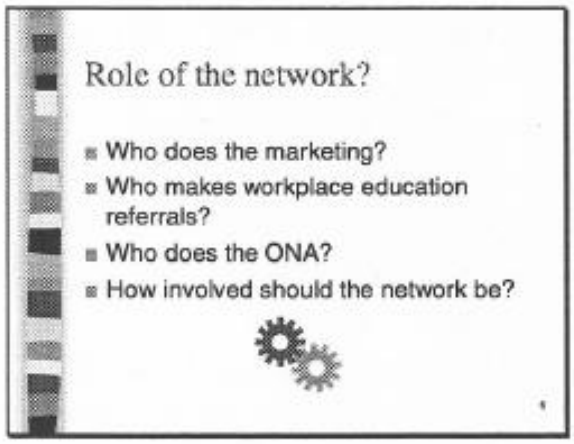
questionnaire was sent What we would change:
-an alphacom discussion would be set up immediately. We would also allow the providers options of how they want information to be sent to them.
-ask each agency their requirements for confidentiality before meetings
-for new providers to workplace a one-to-one information gathering process was needed

Slide 5



What we did:
-we had a full agenda for meetings with timelines for 2 hours, but that didn't allow for much discussion and meetings ran closer to 3 hours
-the minutes were sometimes 6 to 8 pages long
-Sande Minke attended all our workplace meetings
What we would change:
-keep the meetings to 2 hours or less
with shorter agendas and placing other items for discussion on alphaplus or e-mail
-Robert Dupuis came to explain the workplace strategy and unfortunately, instead of helping clarification it made a few providers feel "forced" and defensive
-minutes needed to be shorter with only point form information
-one completely separate page was sent with the minutes showing action items and who was responsible for them (I.e. hourly fees ... WRDSB ... and date needed by)

Slide 6



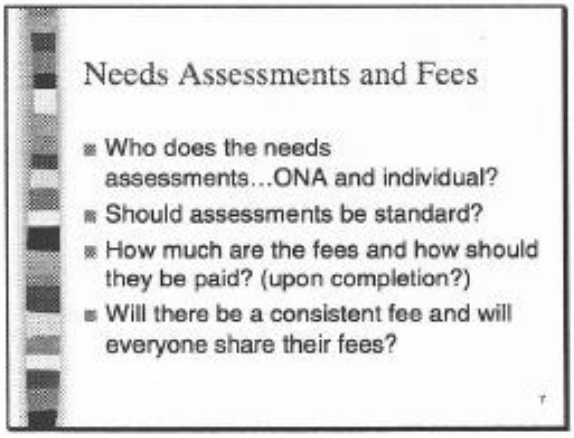
It was decided that it would be best if Project READ did the marketing ... centralized and unbiased as the coordinating body. Workplaces need one point of contact and that is key to success.

Since PRLN already does common assessments for OW it was a little easier to decide they should be the referring body. However, it still required discussion as to how the referrals would be done and decided upon and how feedback would be obtained.

It was decided that the ONA needed to be done by PRLN as the referring body. It would just be an initial assessment and the agency would do a full needs assessment as part of their program/training.

The providers have complete control over how involved they want the network .. .in some cases the network maybe considered a provider (I.e. clear writing).

Slide 7



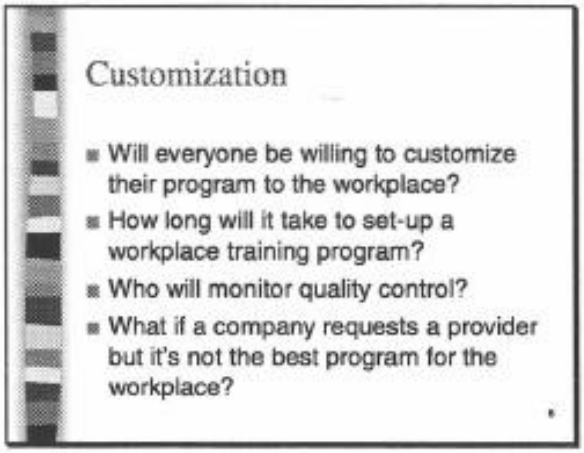
As previously mentioned PRLN would do the ONA and providers would do the individual assessments. (Explain what an ONA is)

The question of should assessments be standard for the individual and in-depth assessments was asked. Sharing assessments was done at training, but it was felt that each agency has their own policies and procedures for doing assessments.

At first sharing fees was a fear, as people were worried about the competitive edge and the potential.

undercutting. Instead we all agreed upon a fee range, which also helped providers not familiar with workplace to establish an appropriate fee schedule.
A fee range was good ... that way no one would know for sure if they were asked to bid for a contract who was also bidding and what they would be charging. It also allowed for a consistency amongst all the providers.

Slide 8



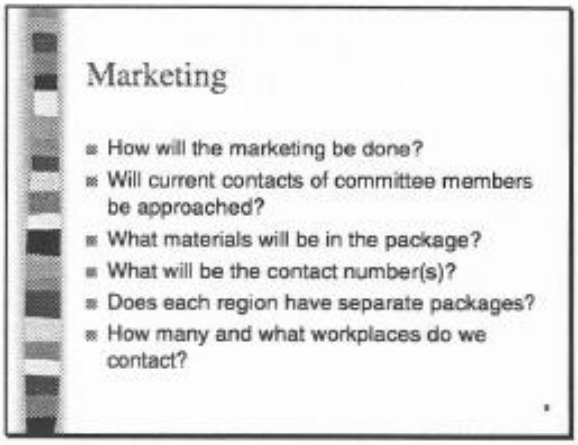
Quality control was a concern .. .it was important for everyone to know that they needed to customize each training program for each workplace's needs and have everyone agree to this and some basic quality standards.

At first everyone thought a couple of weeks would be fine ... after training, providers realized it may take a few weeks to develop the proper program for a worksite until they become familiar with the process.

After much discussion, it was decided that PRLN would do an evaluation of the workplace program and would share their findings with the practitioner/ provider for input before reporting to the workplace. Programs will still do their own form of evaluation.

This turned out to be very easy as usually it would be the college or school board (as they are currently providing workplace training), so if a peer tutoring was the better program the college would sub-contract to the appropriate agency.

Slide 9



It was decided that PRLN would do all the marketing and committee members would decide if they would share their current contacts and whether or not we can contact them ... that would be up to the individual agency .

Review the marketing package with them and contents.

Currently PRLN's numbers are the contact, but depending on how workplace will be done (hiring a marketer) it could be another number if it is an independent contractor.

Each region felt it was important to have separate packages, since PRLN has a Wellington number and a Waterloo number. It was also decided that groups would stay within their current provider's geographic region.

At first we had lofty numbers ... 20 contracts ... we became more realistic that one contract would be more realistic and not to just focus on what the environmental scan showed.

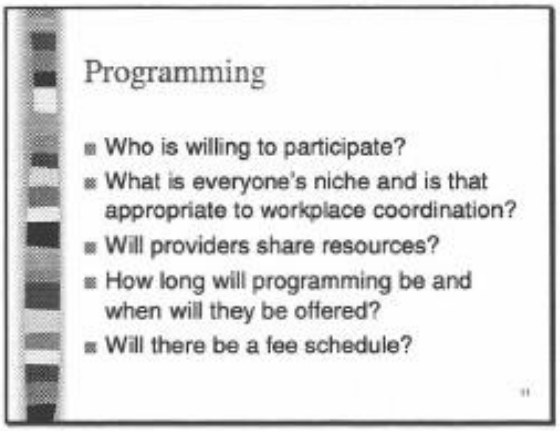
Slide 10

Once again, it was up to the individual agency, but all agencies did share their contacts and names, as no one was currently successfully marketing basic skills, only trades, technical and GED or high school credits were being done.

This is why it is important to have a decision made on who would do the evaluations. Since PRLN will do evaluations to start (review and evaluating this process will be ongoing), providers will share their workplace contract information with the network.

After training, it was decided that each group would do their own contracts (as some have standard ones in place), but PRLN would act as an assistant for groups developing contracts. During training sample contracts were also shared with the group, so no one will be starting from scratch.

Slide 11



Not everyone has the current capacity to provide workplace education, but everyone MUST provide workforce training. Community-based had the most difficulties, but then realized their small group and certainly their expertise on peer tutoring could be utilized (explain peer tutoring like LLC).

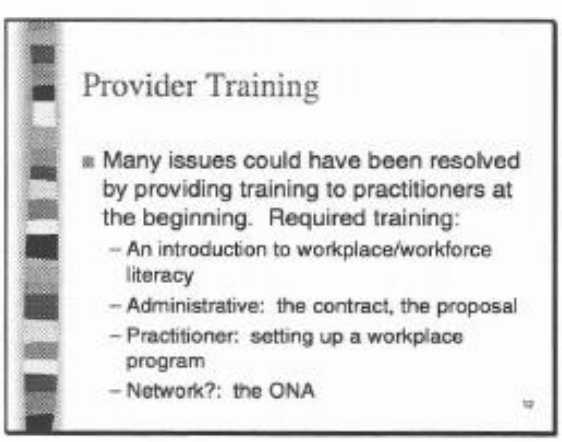
Inherent problem ... since not funded by MTCU who is to say what anyone can do??? At first it was a "we can do everything", but then realizing that quality control and the feasibility of a college providing peer tutoring wouldn't be financially profitable ... so LSP niches were generally followed.

Sharing resources ... some were quite willing to share ... everyone was willing to share, but colleges and school boards would request purchasing resources they developed.

Length of programming will be based on the need of the workplace. Each agency decided when they could offer training and where ... we were able to cover 2417 which is a necessity.

Fees would be based on the range model.

Slide 12

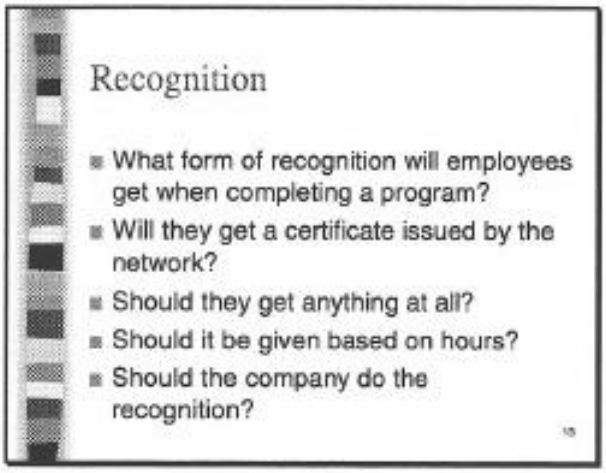


Introduction allowed for an overview of workplace training and programming and was given by an expert in the field, Sue Folinsbee. An expert is required, as everyone knew it was coming from experience and not theory.

Separate training for administrators and practitioners was extremely useful ... a half-day for each and everyone felt much more comfortable with the process. Practitioners full appreciated meeting workplace needs and not worrying about the MATRIX :).

We had training on ONA's and that is when it was made easy for the providers to allow the network to do them. It's not an easy process, so one recommendation our project will make is for ONA training for coordinators of workplace training.

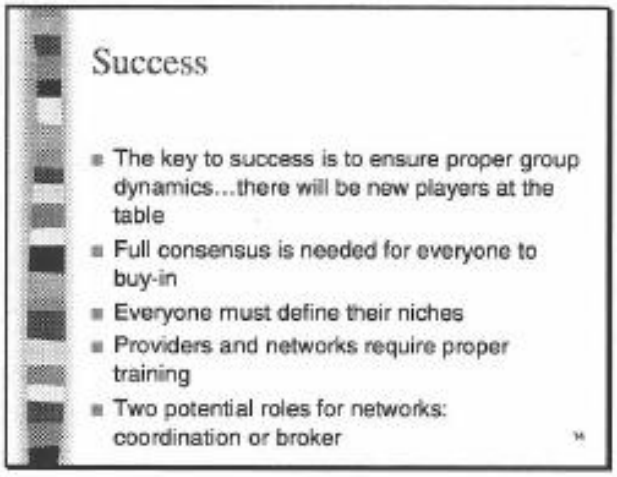
Slide 13



After much discussion on this topic:
Should the network have set certificates?
Should the employers have set certificates?
Should each provider have certificates?

.. .it was decided that we do not issue certificates, but the employer can provide their own recognition of
learning if they choose to do so.

Slide 14



Just the final bullet point:

Coordination is what we are doing. ABLN in Hamilton is doing the broker approach where they will negotiate everything and will put the potential contract out for bidding . The bidding could also include the network as a provider.

Our project will also be making recommendations on the financial and capacity requirements for networks and agencies to use the coordinator model. It will also be making recommendations on timelines and skill requirements to do the marketing. To give credit, this was asked for by MTCU ... they
know it will require more money and they need to know how much that will be.

Other projects:
-workplace resources and tools
-the broker model

Projects to come:
-marketing, training and more resources and tools