

F u t u r E d

**The Electronic Learning Record:  
Assessment and Management  
of Skills and Knowledge**

**Research Report**

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## 1. INTRODUCTION

This research report is the final element of a research project on the concept of an electronic learning record (ELR) or portfolio – a digitally-generated and stored inventory of the skills and knowledge acquired by an individual through either formal or informal learning. The research has been undertaken by Dr. Kathryn Barker of FuturEd for Literacy BC and the National Literacy Secretariat over the fall of 1999, and completed in January 2000.

The purpose of the research has been to explore the hypothesis that having an individual learning record could benefit the individual and perhaps their employer, career counselor and/or training provider, an hypothesis generated largely by the Canadian Labour Force Development Board (CLFDB) and reinforced by the Organization for Economic Cooperation and Development (OECD).

The project began with a thorough review of the related literature,<sup>1</sup> incorporating the following concepts:

- the learning record with samples from different education levels and various countries.
- the Skills and Knowledge Profile (SKP) proposed by the CLFDB (1997) with public policy goals and recommended principles of good practice.
- the learning portfolio and portfolio assessment.
- the electronic portfolio with samples from different levels and approaches.
- methods of recognizing and managing learning in the Knowledge-based Economy (KBE), specifically Human Capital Accounting (HCA) put forward by the OECD (1997).
- links between HCA and lifelong learning, return-on-investment in training, assessment of acquired formal and non-formal learning (Prior Learning Assessment and Recognition -- PLA/PLAR), the future of labour relations, and validation issues.

The concept of a learning record has emerged from developments in the fields of adult literacy, prior learning assessment, lifelong learning, skills profiling and assessment, workforce development, the globalized knowledge-based economy, learning management, and human

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<sup>1</sup> Available in the Prior Learning Assessment section of the e-library at <http://www.futured.com/>

resources accounting. From the most recent systematic work on this concept,<sup>2</sup> a learning record has been characterized as *a tool with which an individual can express his/her formal and non-formal learning in a standardized and credible manner to a wide variety of stakeholders for personal, economic and education/training development.* In this paper, the term “learning” is used synonymously with “skills and knowledge;” the term “record” is similar to profile, inventory, résumé, dossier, skills passport or portfolio. A learning record is a cumulative account of an individual's learning, perhaps a different form of resume.

This study of the ELR is imbedded in national and international developmental work on (1) PLA/PLAR (Prior Learning Assessment and Recognition), (2) lifelong literacy and learning, (3) workforce skills assessment and enhancement; and (4) electronic LMI (Labour Market Information) systems and human capital accounting (HCA), based on the following logic.

A learning record is one logical outcome of the PLA/PLAR process. If a person goes to the trouble of determining what s/he knows and can do from education, life and work experiences, it only makes sense to keep a record of that. It has been hypothesized that both PLA/PLAR and a learning record can be used by the individual for career planning and development purposes: to capitalize on strengths, identify learning deficits, and plan for future training or work.

A typical PLA/PLAR process includes the development of a portfolio of the acquired skills and knowledge of an individual. Some efforts have been made to systematize and digitize the PLA portfolio, on the assumptions that using a computer to organize and manage a skills portfolio is both effective and efficient. This assumption is the basis of massive amounts of development work on an Electronic Labour Exchange (ELE) and digital labour market information services in Canada. FuturEd has hypothesized that digital or electronic portfolios could be integrated into the ELE as the individual's contribution to the labour exchange function, in aid of matching the right people to jobs and to training. Electronic portfolios and learning records are currently being used, in a limited fashion, in the fields of education and training at all levels.

Portfolio assessment is widely used in the education/training environment, and is particularly utilized and studied in the teaching of literacy, both for children and adults. The use of portfolio assessment, PLAR and a learning record is consistent with values and practices in adult and

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<sup>2</sup> Work completed in 1997 by FuturEd for the Canadian Labour Force Development Board resulted policy recommendations for a Skills and Knowledge Profile. Available at <http://www.plar.com/>

workplace literacy. Practitioners know to build from strengths in teaching new skills and knowledge, to conduct pre-training skills assessments, and to keep records of progress. Adult educators know that the plans and records are the property of individuals who can and should use them to their advantage in accessing training and employment.

Many Canadians are limited in their capacity to become “lifelong learners” and/or acquire stable, ongoing employment by inadequate literacy or essential skills. Many Canadians, however, have skills and knowledge banks that are not utilized effectively or efficiently within the economy. In brief, the need for new forms of assessment, recognition, management and utilization of learning, particularly of adults, is related to the need for different and better human resources development policies and outcomes relative to the Knowledge-based Economy.

In the emerging Knowledge-based Economy, work is rewarded, not by the traditional measure of time spent at a task, but by achievement of quality outcomes. Knowledge – data, information and wisdom – are the keys to improving quality and productivity. Traditional employment is giving way to work environments based on the use and production of knowledge. In that environment, it is becoming more and more important for individuals to be clear about what they know and can do, what they provide as niche “producer,” what they need to be able to do in the future. Traditional academic credentials do not capture these notions as a learning record can. The learning record may become a different form of resume, setting out the individual’s competitive advantage with appropriate substantiation, e.g., credentials, portfolios, artifacts.

To meet increasing and changing skill demands in the economy, citizens of developed economies like Canada are encouraged to become “lifelong learners;” however, the incentives for doing so are vague. The value of formal credentials as the only recognition of learning is being challenged by structural changes in the workplace, in production and consumption. In the promotion of lifelong learning and workforce education/training, the need for “incentives” has been identified – real reasons apart from credentials; real reasons that translate into tangible benefits for individuals, employers, social agencies and society at large. This is the basis for Human Capital Accounting – the management of the knowledge embodied in humans.

A learning record may be a necessary component of Human Capital Accounting. It has been hypothesized that a learning record can help to manage human resources better:

- ◆ better matching of the individual's skills and knowledge to those required in employment;
- ◆ better understand of the learning to target for upgrading efforts and better return-on-investment for those who fund workforce upgrading;
- ◆ better utilization of existing skills and knowledge in the workforce.

Through Human Capital Accounting, all learning is assessed and recognized within the employment environment, thereby providing incentives for lifelong learning and improving human resources utilization.

The most appropriate means of arriving at a learning record may be the portfolio development and learning assessment methods PLA/PLAR. Most recent development of the concept of a learning record has led to the ELR. Individuals use a computer program – perhaps on-line – to generate and preserve a comprehensive list of their skills and knowledge after they've decided to return to formal training or seek different work. The idea of developing an ELR in advance of choosing a training option or seeking career advancement is not unconventional, however, it is made more so by the application of assessment techniques and principles inherent in good PLAR *prior* to choosing a training option or seeking career advancement, to help make those decisions, rather than *after* making decisions and seeking, e.g., advanced placement in a course or program.

The literature review, then, set the stage for a research project intended to examine the hypothesis that an individualized, ELR could be used to improve the effectiveness, efficiency and equity in training and employment environments. This report sets out the research questions, processes and data gathering, synthesized data, outcomes and recommendations.

## **2. RESEARCH**

This project explored the potential effectiveness and efficiency of learning records in the workplace – their use and utility in meeting policy goals of increasing return-on-investment in training and increasing Canada's prosperity in the globalized knowledge-based economy.

### **2.1. The Research Questions**

This project focused on the following research questions.

1. What process can be used to determine the utility of a learning record or skills portfolio from the point of view of individuals, employers, career planners and educators?
2. What are the attributes of an ELR that make it useful for adults in the context of creating a personal skills and knowledge profile?
3. From the perspective of each of the stakeholder groups, how effective is an ELR for:
  - 3.1. career planning purposes?
  - 3.2. increasing access to advancement or career development?
  - 3.3. increasing the effectiveness and efficiency of training?

### **2.2. Data Gathering Processes**

This research project focused, not on the content or format of an ELR, but on the utility. Therefore, from the various ELR available, FuturEd selected the on-line PLA Self-Assessment Tools of the Open Learning Agency (OLA) as an easily-available, representative ELR. As that tool was not actually interactive, it was downloaded from the website and moderately modified, with the written permission of OLA, so that it could be completed electronically, either as a word processing file on a diskette or via e-mail (please see Appendix A).

Cooperation and volunteers were sought from two large BC industries:

- the travel industry, Canadian Airlines International (CAI).
- the hospitality industry, the Pan Pacific Hotel (PPH).

The individuals and their supervisors were all, as it turned out, supervisors and/or managers themselves and they were, in the final analysis, able to provide two perspectives: employee

and employer. The individuals were given written instructions (please see Appendix B) and the LR tool. At CAI, the LR was distributed via e-mail to the four volunteers who worked in three different Canadian cities: Vancouver, Calgary and Toronto. At PPH, the LR was distributed in the form of diskettes to the 12 volunteers in a brief, group presentation. All was going well until Christmas pressures intervened for the volunteers, and anticipated timeframes had to be adjusted and readjusted.

In January, then, when volunteers could be contacted, the four CAI staff were interviewed individually via telephone. PPH volunteers were assembled for a focus group with six attending. The interview questions were as follows.

1. Did you complete the LR?
2. What problems did you have completing the LR?
3. What recommendations would you make to improve the format/content?
4. How would you improve the process of completing the LR?
5. Did you try to use the LR?
6. Who or what you approached, and for what purpose? (e.g., your boss with a training request; a college for advance credit when entering a training program)
7. What happened? (Positive and negative; planned or unplanned)
8. What benefit do you see to having your own personalized Learning Record?

### **2.3. Synthesized Data**

The data gathered were informed opinions; informed in the sense that volunteers attempted to follow the instructions and had become relatively familiar with the content and the intent of the ELR. What follows is the combined response to the questions posed.

Only 2 of the 16 volunteers completed their learning records, one from each of the two groups.

They experienced a variety of problems in completing the learning record, even if they did actually complete a learning record, as per the following observations.

- Like most assessment tools, I found that I didn't have a shared understanding of the 5 point scale. This caused me to doubt how I should rate myself and believe the scale may not be applied the same by others.

- I didn't know if it was acceptable to leave a blank on areas I couldn't answer or understand.
- I was not clear of how much detail I should provide or what would constitute an appropriate verification of learning.
- I found the process to be very time-consuming, especially as it was not a "dedicated" work project.
- I found it hard to measure time.
- It requires a lot of thinking, especially the concept of demonstrating the skill. It was difficult to come up with proof of claims, especially soft skills. Is my word good enough?
- The chronology part was repetitive, and I wasn't sure about some questions.
- The answers you'd give depend, sometimes, on the audience or reader.
- It was just too much work, requiring too much thought.
- There were too many little pieces that became redundant.
- It wasn't always consistent.
- It would be very hard to get the actual information about / from the past, for example, about courses taken a few years ago.
- It's hard to remember everything.
- In general, the non-formal learning was ignored. I just focused on work.
- Some skills are hard to capture or describe, like "creativity." I like decorating but how do I describe that?
- I was afraid to sound cocky.

They made recommendations to improve the format/content.

- I think that for the Employability Skills Profile (step 1) you might be able to produce a list of competencies that participants could select the ones that best resembles their skill level. We have started using this format in our job evaluation process and it appears to be easier than trying to draft something from scratch.
- I needed to use glossary, often I was not sure.
- It would help to have examples to start the thinking.
- Leisure-time activities are harder to incorporate in the LR.
- It would help to focus on activities rather than on skills. Skills can then emerge from the activities that you've thought about.



And they made suggestions to improve the process of completing the LR.

- The actual process of completing the LR went pretty well. It was the time required in collecting all the data that created the greatest challenges. I think if someone could attend a mini workshop to provide an overview of the process and establish how the rating scale is to be used would be useful prior to starting to fill the forms in isolation.
- I recommend a forum or workshop. It would provide synergy with other participants and clarification from a facilitator. (Almost all participants said this.)
- I seemed to need an incentive.
- I would have liked a coach.
- It's important to pick the right time. If you do it while under stress, you might be digging too hard, looking for things that aren't there.
- It's tough to do alone.
- It was so long, taking too long. Can it be shortened?
- Stress doesn't help.
- I would have liked acknowledgement of completion and accuracy at the end of the process.
- It might be a good exercise to do with a partner or trusted colleague, but who would you trust for useful feedback and examples?
- A facilitator would be able to provide key questions to get us started.
- A workshop would be best if there was assigned preparation in advance, for example, gathering chronological information.
- It must be voluntary. You can't make people do this.

Only two of the volunteers had plans to use the Learning Record. One who completed the record said:

- This LR will provide me with a central source that can be used to identify areas of strength and area that require further development. It will also serve as a data base to update my resume for specific jobs I may want to apply for and help me prepare to respond to BDI interview questions. The process has helped me recall a lot of experience I had forgotten. At some later date I would like to see if I could use it to gain credit for part of a HR certification program offered at University of Calgary.

And one who did not said:

- I want to complete it. I'll use to make my resume better, provide better examples.

Despite the fact that most participants did not complete their ELR, they all could see benefits to having one's own personalized Electronic Learning Record.

- I found it to be therapeutic since it forced me to review my lifetime of learning and as a result of this my confidence in what I can do has increased.
- It will permit me to bring forward transferable skill sets if I am forced to change industries as a result of a pending merger.
- It helped mentally plan for future interviews.
- I completed about half; and I enjoyed what I did. I could see, in the chronology, how I had grown through various jobs.
- It makes you think of things you don't typically put in your resume.
- It was intriguing to do, looking back at my own past, and I'll continue to do that.
- Although I didn't finish it, I used it to update my resume.
- I could see the gap between what I could do and what I wanted to be able to do for some jobs I saw advertised. The gap was smaller than I thought.
- I could use it like a ladder for my career development.
- It makes you think: "what's the next step for me?"
- It helps me accept that change is inevitable, even good. It's just natural to change jobs and move on.
- It increased my self-confidence and my sense of uniqueness.
- Having an LR could be the difference between getting in the door and a good interview.
- University degrees are irrelevant. This is a better way to show what potential employees can do.
- I'll use these ideas as I interview new personnel.
- I'd never use this in place of a resume. It's too long. Nobody would read it.
- I realize I'm not using my staff's various skills.
- It helps me to set goals. That's good.

It was not possible to gather data about the actual use of the LR because only two actually completed their LR and neither had an occasion to use it. Further to that, beyond considerable encouragement, it was not possible to ensure that participants complete an LR because the amount of time required was well beyond that which the employer had volunteered for the project.

### 3. OUTCOMES AND RECOMMENDATIONS

The fundamental hypothesis for this project has been that the systematic development and use of an ELR could increase educational productivity, enhance economic productivity and resource utilization, and enable individuals to maintain balance and a sense of self in turbulent times.

#### 3.1. General Observations

This project, although limited in size and scope, lends support to the general hypothesis and to three of the six more specific hypotheses put forward by the CLFDB in 1997.

1. *If time and finances should not be wasted as they are when the formal learning system (1) does not recognize that individuals may already possess some skills and knowledge, and (2) expects learners to fit standard program timeframes, then the ELR could be a means to recognize that individuals, as potential students, have and can credibly demonstrate their acquired learning so that they may shorten formal study/training time, meet some pre-requisites, and target learning needs.*

Participants in this study indicated that an ELR helped them with setting goals, doing their own skills-gap analysis, making career plans, and perhaps getting academic credit for acquired skills and knowledge. The national study of PLAR credits in community colleges provides some support for the hypothesis that the ELR would contribute to the effectiveness, efficiency and equity of education and training by increasing access and reducing redundancy. However, to study this further, participants would have to complete the ELR as a career planning device rather than after making application for advanced credit.

2. *If employers should realize the full capacity in their workforce, then the ELR could be a means by which employers could use understand and utilize the individual and collective skills and knowledge of their existing workforce.*

Participants in this study indicated that they weren't necessarily using the various skills of their workers.

3. *If lifelong learning is an expectation in contemporary society, then the ELR could be a means by which to keep track of skills and knowledge acquired by individuals.*

Participants indicated that they enjoyed the process of looking back at what they'd accomplished and seeing their own growth, but that it was hard to remember and capture everything, and they would need help to create an ELR.

From this study, there is considerable support for the assertion that the ELR should contribute to the ability of individuals to maintain balance and a sense of self in turbulent times by increasing self-awareness, utilizing strengths and improving on skill/knowledge deficits, and career planning. None of the participants thought an ELR was a bad idea; and many benefits were listed.

This study was not able to support the hypothesis that the ELR should contribute to economic productivity and resource utilization by enabling the appropriate utilization of the existing skills and knowledge of individuals, by workers and learners, and of the existing workforce by employers and industry; and increasing access to employment for the unemployed, and to appropriate employment for the underemployed by profiling (identifying and listing) the entire range of skills and knowledge held by individuals. In point of fact, it used resources – time, energy and expertise – that were in short supply.

### **3.2. Recommendations Regarding the ELR**

From this project, the following specific recommendations are made.

1. To generate an ELR, a person must be given considerable dedicated time and professional assistance. This may also be true for the process of updating an ELR to keep it current. A workshop may be the preferred process.
2. A method of demonstrating and/or verifying skills and knowledge, beyond credentials, must be developed and systematically adopted to ensure confidence in the ELR, particularly if non-formal learning is to be recognized.
3. An ELR must be designed with no redundancies, with explicit instructions, and with examples and a glossary of terms. Ideally, it would be interactive.
4. To be effective and efficient as a system, and to achieve the public policy goals, the ELR should be developed on a province-wide or nation-wide basis.

The OECD notes that firms do not have the capabilities or financial means to pursue assessments that are often imprecise or expensive; nor do they have the negotiating experience to allow them to enter into contracts that explicitly validate the estimated value to the firm of a person's acquired skills. According to the OECD, in the absence of nation-wide efforts to establish appropriate and affordable human capital information and decision-making systems, firms are unable or unwilling to develop such systems on their own are likely to suffer from lower productivity growth and reduced ability to compete because they will be less effective and efficient in acquiring and using human-embodied knowledge. To this end, the OECD acknowledged PLA/PLAR as a most promising area of innovation, referring to it as "achievement-based evaluation of human capital accumulation." They note that there is a new and growing potential to turn measurement into valuation as new active labour market policies are combined with reform of educational financing and closer ties between learning institutions and the workplace.

To enable the development of a province-wide or nation-wide ELR system as recommended by the OECD, FuturEd would recommend that the CLFDB "standards" be seen as "goals" for the development or achievement of a nation-wide ELR system. That is to say, it should be a goal to develop a province-wide or nation-wide system of ELR development and use with an ELR that:

1. lists and describes skills and knowledge in a way that is recognized and respected by all the labour market partners;
2. has the capacity to be a complete inventory of skills and knowledge acquired by the individual regardless of where they were acquired;
3. encourages or enables an individual to develop and own his/her ELR;
4. incorporates content that is current, accurate and verifiable;
5. allows flexibility to accommodate unique or industry-specific skills;
6. follows a standardized format linked to existing and developing labour market exchange systems;
7. is relatively simple and straight forward to complete;
8. is free of such barriers as social identity, disability and geography;
9. is free of gender, age and other kinds of bias;
10. does not create barriers; for example, a person who does not have an ELR is not discriminated against for the lack of one, or for the skills revealed.

### 3.3. Recommendations for Future Research

This study was not able to lend support to the following three hypotheses put forward by the CLFDB in 1997, only because the participants did not fall into the specified categories: unemployed or underemployed, foreign-trained workers, or using an electronic labour exchange system. Each could be targeted and studied in the future.

1. *If human potential should not be wasted because individuals are unemployed and/or underemployed due to the fact that their repertoire of skills and knowledge is not fully catalogued or utilized, then the ELR could be a means by which to recognize an individual's entire repertoire of skills and knowledge acquired through formal education/training and through life and work experience.*

To study this, participants would have to be either unemployed or underemployed in some definitive way. Given the need for time and assistance, this would require dedicated resources.

2. *If immigration policy favors individuals with high levels of skill and knowledge, yet those very people have difficulty getting employment that takes advantage of their acquired skill and knowledge, the ELR could be a means by which employers and accrediting institutions can assess and recognize the body of skills and knowledge that foreign-trained workers bring to the employment environment.*

To study this, participants would have to be foreign-trained workers. There is huge potential here given the current concerns vis-à-vis skills shortages and immigration policies.

3. *If people and jobs should be more easily matched because (1) individuals should present their entire record of learning, and (2) matching processes should be less numerous and varied, then the ELR could be a means both workers and employers could match individual learning records to skills and knowledge requirements in a systematic, authentic fashion.*

To study this, participants would have to be using a comprehensive electronic labour exchange system that recognizes formal and non-formal learning. In point of fact, this has been

recognized by employers. For example, in 1989, CAI had developed an electronic database for employee skills and job matching “ready to roll” but it was not used because of economics.

In short, to study the utility of the ELR, individuals must be given the necessary resources – time and assistance – to complete their own ELR.

### **3.4. Conclusion**

In conclusion, the links between HCA, lifelong learning, PLA/PLAR and the ELR have been demonstrated within this project. The purpose of this research project was to focus on the potential advantages of a learning record to an individual in terms of access to employment, training and advancement. The outcome of the project, given the limitations of size and scope, is that the ELR is of value to individuals, to employers and to society in the context of changes in learning needs and work opportunities.

## Appendix A: The Learning Record Used

### The ELR: Creating Your Personal Inventory of Skills and Knowledge

#### Introduction:

All your life you've been learning things. You've learned skills and knowledge from formal education and training, work experience, volunteer and community service, family responsibilities, books, hobbies and travel. You'd be surprised at how much you know!

With this program, you will be able to create a generic, all-purpose portfolio that sums up your past experience, your present situation, and your aspirations for the future. You may choose to use it when you make career or training plans. You can take it with you to an interview with an employment counselor or registration advisor at an educational institution. You may also be able to use it as an extended resume that you can take to a job interview.

You can start with this tool, and update it regularly. It is yours, private and confidential, to use as you plan your future career, seek advancement, and pursue lifelong learning.

#### Credit to the Open Learning Agency:

This ELR is a special adaptation by FuturEd (1999) of the portfolio development process\*, part of the Prior Learning Assessment (PLA) service of the Open Learning Agency (OLA). The PLA website is located at <http://www.ola.bc.ca/pla/home.html> and the actual self-assessment tools begin at <http://www.ola.bc.ca/pla/resources/tools.html>. You are encouraged to have a look at the entire PLA website and to gather general information about the Open Learning Agency from any of these addresses:

*Mail:* Open Learning Agency  
4355 Mathissi Place  
Burnaby, B.C. Canada  
V5G 4S8  
*Telephone:* (604) 431-3000 or toll-free 1-800-663-1663 within BC  
*Fax:* (604) 431-3333  
*E-mail:* [olainfo@ola.bc.ca](mailto:olainfo@ola.bc.ca)

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\*If you aren't sure about the labels, there is a **glossary** of terms at the **end** of this program.



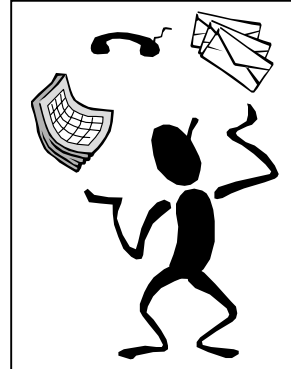
## Getting Started:

You are going to fill out 4 tools. They will require you to think about your past work and life experiences, so you'll take some time to complete this the first time.

In fact, you'll never be "finished" because you will always be adding to it.

The tools you'll find here focus on four areas:

1. your general employability skills \*
2. your history of work and education experiences
3. your specific work skills
4. your goals and plans



## **Step 1.** Identifying Your "Employability" Strengths and Weaknesses

The Conference Board of Canada has developed an Employability Skills Profile that describes the skills necessary for success in the workplace.

We have taken the Conference Board's checklist one step farther by putting it into three easy-to-fill-out tables that you can use to assess your own employability skills and to identify your own particular strengths and weaknesses.

- ◆ Personal Management Skills Table
- ◆ Teamwork Skills Table
- ◆ Academic Skills Table

### Directions:

As you fill out the following three tables, give serious thought to how you would demonstrate the skill. You will need to have *evidence\**, perhaps work *samples\**. There are many *assessment options\**. You may require a *letter of verification\** or *letter of attestation\**. Your evidence should stand the test of the *technical requirements\** for acceptable evidence.

Rate each skill on a scale of 1 through 5 (1 = Basic Knowledge; 3 = Some Experience; 5 = Expertise or Mastery). If you feel you have more than some experience but are not really an "expert," give yourself a 4. Keep in mind as you fill out the tables that you will not be equally strong in all employability skills. While you may have only basic knowledge of some skills, you will have expert knowledge and expertise in others.

This page is found on-line at <http://www.ola.bc.ca/pla/resources/tools/tool2.html>.

**Step 1.1. Personal Management Skills**

The combination of "personal management" skills includes a those attitudes and behaviors that are required to get, keep, and progress on a job and to achieve the best results. Fill in this table as best you can. Remember you can always add to it or change it.

**Step 1.1.1. Positive Attitude**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Self-esteem and self-confidence			
Honesty, integrity, personal ethics			
Positive attitude toward personal growth and health			
Initiative, energy, and persistence to get the job done			

**Step 1.1.2. Responsibility**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Ability to set goals and priorities			
Ability to plan and manage time, money, and other resources to achieve a goal			
Accountability for actions taken			

**Step 1.1.3. Adaptability**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Positive attitude toward change			
Recognition of and respect for people's diversity and individual differences			
Ability to identify and suggest new ideas to get the job done – creatively			

### **Step 1.2. Teamwork Skills**

Teamwork skills are those needed to work with others on the job and to achieve the best results.

#### **Working with Others**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Understand and contribute to the organization's goals			
Understand and work within the culture of the group			
Plan and make decisions with others and support the outcomes			
Respect the thoughts and opinions of others in the group			
Exercise "give and take" to achieve group results			
Seek a team approach as appropriate			
Lead when appropriate, mobilizing the group for high performance			

**Step 1.3. Academic Skills**

**Step 1.3.1. Communication Skills**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Understand and speak the languages in which business is conducted			
Listen to, understand and learn			
Read, comprehend, and use written materials, including graphs, charts, and displays			
Write effectively in the languages in which business is conducted			

**Step 1.3.2. Thinking**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Think critically and act logically to evaluate situations, solve problems, and make decisions			
Understand and solve problems involving mathematics and use the results			
Use technology, instruments, tools, and information systems effectively			
Access and apply specialized knowledge from various fields (for example, skilled trades, technology, physical sciences, arts, and social sciences)			

**Step 1.3.3. Learning**

<i>Employability Skill</i>	<i>Where, when, and how have I used this skill?</i>	<i>How can I prove or demonstrate that I have this skill?</i>	<i>How do I rate with this skill?</i>
Willingness to learn			



## **Step 2. Preparing Your Chronology**

A chronology is a personal document, much like an expanded resumé, that sets out, either year-by-year or by clusters of years, your professional/vocational and educational/training history. In it you should include all your unpaid and volunteer activities. Omit, however, anything that is of a highly personal nature.

In addition to recording where you were employed and what you did, or that you earned a certificate, etc., describe -- in much more detail than you would in a standard resumé -- what you learned during that time. In order to be a really valuable section in your portfolio, your *professional or vocational chronology*\* must illustrate both:

- ◆ how each learning experience was used as a stepping stone to the next.
- ◆ how your life-long learning represents a continuum rather than a series of discrete learning experiences.

**Directions:** Fill out a form for each year (or cluster of related years). You can do that by first copying the blank form (10 questions) and pasting it several times, one after another.

### **My Chronology**

Years(s):	
<i>Where did I work, attend school, or volunteer in this year or cluster of years?</i>	
<i>Which position did I hold and/or courses did I take?</i>	
<i>What were my duties and responsibilities for my job?</i>	
<i>What were the learning outcomes* of the courses or work- or volunteer-related seminars I took?</i>	
<i>Which specific knowledge, skills, abilities and values(KSAVs) did I acquire/develop?</i>	
<i>Which KSAVs helped me to advance in my career or make a career change?</i>	
<i>Which employability skills did I acquire or develop during this time?</i>	
<i>Which of these employability skills helped me to advance in my career or make a career change?</i>	
<i>Did I complete any additional training (through taking a credit or continuing education course, shadowing, mentoring, etc.)?</i>	
<i>Did any other educationally or professionally relevant events happen to me during this time?</i>	

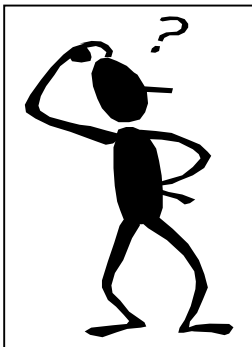
◆ **copy this form and paste more forms here**



## Step 4. Identifying Your Goals

Success usually doesn't happen by accident. One goal statement -- or a few interrelated statements -- can help to point you toward success by identifying both your short- and long-term career, personal, and educational goals. By preparing a goal statement -- and committing to a specific completion date -- you are more likely to succeed.

**Directions:** Fill in the Personal Goals form by identifying, year-by-year, each of your individual goals and planning how you will achieve it. For each personal, career, or educational goal you can identify for yourself, try to fill in the blanks below. Fill out one of these forms for each one of your goals. At the end of each year, it's a good idea to assess your progress and revise your plan for the coming year(s).



Do you need help figuring out what your individual goals are? You might want to write "personal," "career," and "educational" across the top of a blank sheet of paper. Where do you wish to be in each area of your life in, say, three years? What are the steps to get there? (Let's say you want to complete the three college courses you know you need to take to gain admission to university. Do you think you can manage to complete one course per year? What are the obstacles? Can you afford it? Is financial support -- student loan, parents, partner, savings -- available?)

You need to weigh what you wish to achieve against your personal and financial circumstances. (What if your goal is to "go back to university full time" but you are a single parent with two preschool children and a \$20,000 debt? Your goal is probably not achievable right away ... however, breaking your goal down into mini-goals -- secure a good babysitter, take one transferable credit course -- will move you towards the big one.)

### My Goal Statement

<i>For this year ( _____ ), my goal is ....</i>
<i>I will achieve it on ....</i>
<i>The steps I will need to take are ....</i>
<i>Difficulties that might prevent me reaching this goal are ....</i>
<i>But possible ways of overcoming these difficulties are....</i>
<i>I will reward myself once I achieve this goal by ....</i>
<i>Year-end review: How did I do?....</i>

## Glossary of Terms

Glossary of PLA Terminology developed by the Open Learning Agency, and modified slightly by FuturEd.

**Assessment Options** -- Depending on the field, or the KSAVs, or the assessor's preferences, there are a number of ways a candidate can substantiate learning.

- ◆ **Portfolio Development** is the process of collecting, substantiating, and organizing documented evidence to support a candidate's claim for PLA credit or recognition. While a portfolio is used to substantiate what is learned from life experiences, sometimes it may be more appropriate to demonstrate learning through direct observation. For example if you wish to claim credit for oral Gaelic, then demonstration would be best way to prove your competency. A portfolio remains the personal property of the candidate and is returned to the candidate once the credit or competency recommendation is made.
- ◆ Oral Questioning refers to a structured interview between an assessor and a candidate that is intended to permit the assessor to probe the depth and breadth of candidate learning and to give the candidate the opportunity to provide supplementary evidence to support his/her credit claim.
- ◆ A Challenge Exam is intended for students who wish to claim credit for a course that they have not completed. Challenge exams may either be directly linked to specific course content or to a set of generic outcomes. For example, one English Literature challenge exam may test analytical and critical thinking skills as they apply to specific readings while another challenge exam may test analytical and critical thinking skills in a more general way.
- ◆ A Case Study is a tool the PLA Assessor can use that permits a candidate to demonstrate or apply a skill set to a set of circumstances. For example, for an Early Childhood Education assessment the candidate might be given a case study that describes a very complex situation in a daycare centre; the candidate -- either in writing or as an oral presentation -- would then analyze the situation and suggest an action plan.
- ◆ Assignments are often used to remedy minor learning deficiencies. For example, a candidate may be asked to justify actions and summarize findings in a report that may be presented in writing or during an interview. (See also "top up".)
- ◆ Demonstrations are short comprehensive observed demonstrations of specific skills that are deemed critical for professional competence (for example, a credit union Customer Service Representative may be asked to demonstrate his/her ability to explain and sell Mutual Funds to an uninformed client). In some instances the Assessor may need to provide context for the demonstration (so, in the credit union example, the Assessor would prepare the person acting as the "uninformed client" for the role-play).
- ◆ Simulations are an attempt to replicate workplace conditions in order that a candidate may demonstrate his/her competence in a range of critical skills.

**Assessor** -- The specialist who is responsible for assessing a candidate's learning. The assessor will be an expert with specialized knowledge in the subject area being assessed. He or she could be a faculty member at an educational institution, or someone in the workplace, or an expert in the field or profession, and will have been trained in the principles and practices of Prior Learning Assessment. Occasionally, a second specialist (perhaps a member of a professional organization) is also asked to review a candidate's work.

**Canadian Labour Force Development Board** -- The CLFDB -- a national, not-for-profit organization -- is an advisory board that aims to improve access to employment and training for all Canadians. It was established in 1991 in response to the growing consensus that labour market partners should play a greater role in training and human resource development in Canada. The board is made up of: employers; workers and unions; groups representing those wishing equity in education and training; and providers of training and education. Its goal is to work to develop a highly skilled Canadian workforce that contributes to the well-being of Canadians and to a productive and prosperous economy. The CFLDB has worked with partner organizations and people experienced in PLAR assessment to develop national standards for PLAR processes to ensure that individuals receive a fair assessment of their skills and knowledge. These standards are listed on the CFLDB website. The CLFDB has developed a Prior Learning Assessment and Recognition site to promote the effective, efficient, and equitable implementation of PLAR throughout Canada. (Note: CLFDB's use of "PLAR" is synonymous with our use of "PLA" in BC.)

**Centre for Curriculum, Transfer, and Technology** -- The Centre for Curriculum, Transfer, and Technology ("C2T2") is a non-profit society, governed by an appointed Board of Directors that includes educators and students from across British Columbia, as well as representatives from government, business and labour. Funded mainly by the B.C. Ministry of Education Skills and Training, C2T2 is dedicated to pursuing the directions set out in Charting A New Course, the Ministry's strategic plan for the colleges, institutes and agency system. C2T2 acts as a catalyst for change in post-secondary education through initiatives that explore new approaches to curriculum, design and delivery, prior learning assessment, transfer between secondary and post-secondary education, the use of education technology to support education, and new approaches to Learning Outcomes. On the C2T2 website you will note a section on Prior Learning Assessment which includes PLA news, PLA events, articles, reports and descriptions of Best Practices in Prior Learning Assessment.

**Course Challenge** -- There are a few ways to challenge a course. Depending, of course, upon the institution that will grant you credit, you may be able to write a challenge exam or demonstrate your skill/knowledge/ability in some other way, such as completing a project.

**Credit** -- Refers to the value that an institution attaches to a formal course of instruction. At many institutions a "credit" is equivalent to approximately thirty hours of classroom instruction. Credit value, however, is not necessarily standardized across all institutions. For example a three-credit course at one institution may be equivalent to only one-and-a-half credits at another institution.

**Credit Bank** -- The unique Credit Bank Service offered by the Open Learning Agency allows individuals to "bank" evidence of academic or professional achievement. The service operates in much the same way as a bank depository. For example, individuals are free to open an account with OLA, submit records of completion of credit or non-credit courses, and from time to time request a statement of educational achievement.

**Designation** -- When an individual earns a professional designation it means that he/she has earned the right to practice and to accept professional responsibility in a specific field that is governed by a regulatory body. For example, in order to earn the designation of Chartered Accountant and the right to use the initials CA, a person would be required to pass a series of examinations and to practice a particular type of accounting for a specific number of years.

**Distance Education** -- Distance education or distance learning is when the learner is studying at a distance from the source of instruction. It's the opposite of face-to-face education. Much of the learning that takes place at "open learning" style institutions is "at a distance". It could, of course, be argued that all learning takes place at a distance -- three feet, thirty feet, three hundred miles. Some educators call distance education "long distance education". (The term "distance education" has been in vogue for a couple of decades but, just recently, the term "distributed learning" seems to be taking its place. Perhaps with the advent of the World Wide Web, physical distances are not as relevant as were just a few years ago!)

**Evidence** -- The diverse array of evidence a person produces -- in the form of written documents, work samples, or demonstrations -- that are used to substantiate his or her PLA credit claims. The two main categories of evidence are:

- ◆ Direct Evidence -- What the candidate says about himself or herself;
- ◆ Indirect Evidence -- What others say about the candidate.

Evidence may also be referred to as:

- ◆ Performance evidence such as a demonstration (or a video of a demonstration) or a simulation;
- ◆ Supplementary evidence such as the results of oral questioning to determine the depth and breadth of learning;
- ◆ Written documentation such as a letter of reference or job performance evaluation; or
- ◆ Evidence from prior achievements such as a certificate indicating completion of a program, course, or seminar.

Each institution or accrediting body will clearly articulate the strongest types of evidence for substantiating specific learning outcomes.

**Emergent Educational/Training Needs** -- Knowledge and skills that will be required at an intermediate or advanced level at some time in the future. These needs may be identified by a person (perhaps someone who has gone through a goal-setting process and who recognizes a need for additional education or training in order to meet his or her career objectives), or by an employer (perhaps one who has taken an employee through a performance and merit process and who recognizes the person's need for additional training or education to be able to meet the challenges of the evolving workplace), or by some other interested person, such as a career counselor.

**Employability Skills Profile:** -- *What Are Employers Looking For?* is a document created by the Conference Board of Canada that describes the set of skills deemed critical for every member of the Canadian work force and includes academic, personal management, and teamwork skills.

**Experiential Learning** -- This term refers to learning that has been acquired as a result of practical experience rather than through formal education.

**Flexible Assessment** -- One of the terms used in British Columbia to describe the assessment of knowledge, skills, abilities, and values acquired through formal and non-formal education, training or experience as they relate to specific criteria set out by an institution or accrediting body. (See also Prior Learning Assessment)

**Goals or Goals Statement** -- One of the components of a portfolio, the Goals Statement is designed to help a PLA candidate clarify his or her short- and long-term personal, educational, and/or career goals. In addition, it can provide assessors with useful background information about the candidate. This is particularly important when the candidate is being assessed at a distance and is unable to meet face-to-face with his or her assessor.

**International Credential Evaluation Service** -- One of the many services offered by the Open Learning Agency, ICES was launched in 1996 to provide immigrants and Canadians educated abroad with a vehicle to evaluate their educational credentials. It has the capacity to evaluate secondary and post-secondary credentials from every country in the world. ICES reports can be used by employers or as supplementary information for Canadian post-secondary institutions and professional organizations.

**KSAV -- Refers to the Knowledge, Skills, Abilities, and Values** required in a particular field of practice, in a profession, or in an academic discipline. Knowledge, Skills, and Abilities are measurable; whereas Values are subjective.

**Laddering** -- Laddering is the use of one completed credential as the admission requirement for a further (higher level) credential. (Laddering usually involves a moving "up the ladder" from a certificate or a diploma to a degree or professional designation.)

**Learning Outcome** -- In PLA, a learning outcome is a statement of measurable learning that describes what a candidate should know and/or be able to do as a result of formal or informal learning. One learning outcome for a word-processing course might be, for example, that, within forty-five minutes, the candidate is able to key in a four-page report that includes the use of headers, footers, and two imported graphic elements. A learning outcome from a Sign Language Interpreting program might ask a candidate to interact socially within the English-speaking community, using appropriate attention-getting strategies, turn-taking behaviors, proper level of detail, and discourse markers. Graduates will adapt these appropriately to a range of contexts and settings.

**Letter of Verification** -- A formal letter prepared on letterhead that may be used to authenticate work or to verify a candidate's participation in a project.

**Letter of Attestation** -- A formal letter prepared on letterhead, from a former or current employer or supervisor that could serve as a character reference and/or to substantiate a candidate's claim of having acquired transferable skills sets.

**Lifelong Learning** -- All the learning, formal and informal, that a person accumulates during his or her life (much of which may never be granted formal "credit"). Lifelong learning would include the vast range of a person's experience -- such as learning to knit from a grandmother, working as a volunteer teaching aide in a public school, being a long-time member of a reading group, taking a non-credit continuing studies course in creative writing at a university, taking an apprenticeship program in joinery at a college or institute, participating in an on-the-job stress-management seminar, or taking an upper-level cell biology course.

**Mentoring** -- Career mentors are usually experienced professionals or practitioners who volunteer their time to guide and encourage individuals who are less experienced in the workplace. Mentors have no vested interest or personal attachment to the individual they are mentoring and may or may not share the same profession. For example a first year teacher may be paired with an experienced teacher who is willing to share his or her teaching experiences and discuss the pros and cons of different career decisions.

**Non-Formal Learning** -- The skills and knowledge you have gained through learning experiences (such as industry-based training, professional development workshops, seminars, private study, and work experience).

**Open Learning** -- Open learning is a philosophy of education (first popularized by the British Open University in the 1960s and later adopted by institutions all over the world) that "opens" access to education so that anyone can study anything at any place and at any time. An open learning institution is characterized by:

- ◆ Open/flexible admissions policies
- ◆ Flexible start and completion dates
- ◆ Courses offered in a variety of media and methodologies -- including face-to-face, print, telephone, audio-teleconferencing, audio, broadcast TV, video, the Internet
- ◆ Recognition of credentials from other institutions (like BC's Educational Credit Bank)
- ◆ Recognition of international credentials (like BC's ICES)
- ◆ Recognition of lifelong learning (PLA)

**Open Learning Agency (OLA)** -- The Open Learning Agency (OLA) is a publicly funded organization in British Columbia, Canada, that specializes in the delivery of distance education and training. Its degree-granting Open University is accredited through the AUCC; its Open College and Workplace Training Systems provide access to an array of training opportunities. To ensure that OLA's offerings reach the broadest possible audience, it uses a variety of technologies (from print to the most advanced) and works with many industry, government and educational partner institutions -- in BC and around the world.

**Portfolio** -- The package of assembled documented evidence that supports a candidate's claim for PLA credit or recognition. (See also Portfolio under Assessment Options, above.) On the PLA Online website, we use the term "portfolio" quite loosely; we lead you through the development of a sort of generic portfolio, which will be a useful tool for you to take with you to a PLA-granting institution or to a job interview. As a package of documents it will help you identify your academic and career goals and your knowledge, skills, and abilities. Keep in mind that this portfolio is just a starting point and the institution you go to will make you develop it more fully.

**Portfolio Development** -- This is the process of collecting, substantiating, and organizing documented evidence to support a candidate's claim for PLA credit or recognition. While a portfolio is used to substantiate what you have learned from your life experiences, sometimes it may be more appropriate to demonstrate your learning through direct observation. For example if you wish to claim credit for oral Gaelic, then would be best to demonstrate your proficiency. (See also Portfolio under Assessment Options, above.)

**Portfolio Development Course** -- A course designed to assist the candidate in working step-by-step through the process of collecting, substantiating, and organizing documented evidence to support his or her claim for PLA credit or recognition. Individual institutions have the discretion to designate this as a credit or non-credit course. (See also Portfolio under Assessment Options, above.)

**Prerequisite** -- A course or program that must be successfully completed before enrolling in a more advanced course of program. For example, FINC101, "Basic Financial Maths," is the prerequisite for FINC 201 "Intermediate Financial Maths."

**Prior Learning Assessment** -- A thorough description of the process of Prior Learning Assessment is on the What is PLA? page of this site...but , in a nutshell, Prior Learning Assessment (or Flexible Assessment) enables people to gain recognition and credit for what they already know and can do. (They do not receive credit for their experience but rather for what they have learned from their experience.) Prior Learning Assessment -- or PLA -- is the term used most often in British Columbia to describe the process of assessment and recognition of knowledge, skills, abilities, and values (KSAV) acquired through formal and non-formal education, training, or experience as they relate to specific criteria set out by an educational institution or an accrediting body.

Prior Learning Assessment has many names around the world. All these names -- and acronyms -- are ways of referring to the same process of assessing and awarding credit (and therefore formal recognition) for what a person knows and can do.

<b>Abbreviation</b>	<b>Meaning</b>	<b>Country</b>
ACPL	Assessment of Prior Certificated Learning	United Kingdom
APEL	Assessment of Prior Experiential Learning	Eire (Southern Ireland)
APL	Assessment of Prior Learning	United Kingdom
PLA	Prior Learning Assessment	Canada and USA
RPL	Recognition of Prior Learning	Australia
PLAR	Assessment and Recognition of Prior Learning	Canada (term adopted by the CLFDB)

**Prior Learning Assessment and Recognition** -- PLAR is process of determining and recognizing what a person knows and can do. The determination process involves creating an inventory of acquired skills and knowledge. The recognition process may take the form of advance credit when applying to enter and education/training program, or appropriate employment and career advancement.



**PLA Personnel or Team** -- There are three key roles in the PLA process: the candidate, the advisor, and the assessor:

- ◆ PLA Candidate -- An individual who has decided to earn formal recognition of life-long learning by completing a PLA process established by an institution or accrediting body. Some institutions refer to PLA candidates as students.
- ◆ PLA Advisor -- The specialist who is responsible for facilitating candidates through the portfolio development process. While the advisor can advise on the completeness of a portfolio, s/he plays no part in assessment.
- ◆ PLA Assessor -- The specialist who is responsible for assessing candidate learning. In most cases, the assessor is a faculty member who has been trained in the principles and practices of Prior Learning Assessment, and who has specialized knowledge in a subject area. Occasionally, a second specialist (perhaps a member of a professional organization) is asked to review the candidate's work.

**Professional and/or Vocational Chronology** -- A chronology is one of the possible components of a portfolio. A chronology can help the PLA candidate recognize the progression that his or her career has taken over many years and identify the learning that has occurred as the result of specific experiences. A chronology can show how current achievements have been built on past experiences. In addition, the chronology is useful for providing assessors with personal background information. This is particularly important when the candidate is working at a distance and is unable to meet face-to-face with his or her assessor.

**Quality Assurance** -- A way of measuring different pieces of corroborating evidence against each other in order to be reasonably sure of a standard that is claimed....

**Reassessment** -- Reassessment is not a "right" but is a recommendation that an Assessor may make under special circumstances. For example, when unforeseen circumstances occur during a workplace demonstration; or when, despite an obvious wealth of experience, a candidate has been unsuccessful in matching his/her KSA(V) against a set of specific learning outcomes.

**Reflective Thought** -- In PLA "reflective thought" refers to thinking back on specific experiences and finding answers to questions such as:

- ◆ What did I learn?
- ◆ What did I learn about myself during this process?
- ◆ Which earlier learning experiences led me to this learning experience?
- ◆ How have I adapted this learning experience to related experiences?
- ◆ How were difficulties (if any) resolved?
- ◆ What evidence can I provide to substantiate my learning?

**Residency Requirement** -- Many institutions require that, in order for students to be awarded their credential, they complete a minimum number of credits at the awarding institution (studying either face-to-face or at a distance). To the PLA candidate a 50% residency requirement would mean that half the credits for a credential could be earned as a result of PLA, but the remaining 50% would need to be earned as a result of direct or distance instruction by faculty at the institution. Each institution sets its own residency requirement (and also sets its own policies pertaining to reducing or waiving the requirement in special circumstances).

**Self-Assessment Inventories** -- Self-administered-&-scored "quizzes" designed give the individual a rough idea of how, for example, a skills set might rank in relation to the skills of the population-at-large.

**Self-Directed Portfolio Development Manual** -- A manual designed to take the PLA candidate through the steps of collecting, substantiating, and organizing documented evidence to support his or her claim for PLA credit or recognition.

**Shadowing** – Being able to work beside someone and “shadow” them in their work activities to ascertain exactly what it is they do and what job skills a person would need to master in order to perform well on that particular job. Job shadowing is often formalized in secondary school career programs by making a match between, for example, a student considering a career in architecture and an architect.

**Skill Set** -- This is a term used to identify a grouping of complementary skills. For example, the basic skill set for a secretary might include: accurate keyboarding, word processing, formatting and editing expertise, complemented by good knowledge of English grammar and spelling.

**Technical Requirements** -- Refers to a set of evaluation criteria that can be attached to direct and indirect evidence. These include:

- ◆ AUTHENTICITY asks if the candidate can prove conclusive ownership of the submitted evidence
- ◆ SUFFICIENCY asks if there is enough evidence to prove conclusively that the skill or knowledge claimed can be transferred from one context to another.
- ◆ CURRENCY asks if the evidence represents current professional/vocational levels of competency.
- ◆ RELIABILITY asks if the measurement criteria are sufficiently unambiguous to ensure that subsequent assessments of the same evidence would produce similar credit recommendations.

**Top Up** -- Some institutions and accrediting bodies permit candidates to remedy minor deficiencies in their knowledge, skills, or abilities by entering into a formal written learning contract with an Assessor. This contract is sometimes referred to as a "top-up agreement" and outlines the specific learning deficiencies and the method and date of the re-assessment.

**Transcript** -- The formal record of student achievement issued from the Registrar's Office of the institution the student attended.

**Transfer Credit** -- Is a process whereby formal credit awarded by one institution may be applied towards a credential offered by another institution. The BC Transfer Guide may be able to help you determine which of your formal credits will be readily transferable.

**Transferable Skills / Employability Skills** -- These are what employers used to refer to as transferable skills, and more recently what educators have been referring to as employability skills. Although individual institutions and organizations might identify an unique set of transferable skills, they will probably be similar to those outlined by the Conference Board of Canada, 1992; in a brochure entitled *Employability Skills Profile: What Are Employers Looking For?* The critical skills include:

- ◆ Personal Management Skills: Positive attitudes and behaviors, Responsibility and Adaptability
- ◆ Teamwork Skills: Working with others
- ◆ Academic Skills: Communicating, Thinking, Learning

**Work Samples** -- Refers to samples of work that a candidate has created in the workplace. Before submitting work samples as evidence of learning candidates must:

- ◆ Ensure that they have written permission from their employer to use a particular work sample; and,
- ◆ Provide a letter of verification from their employer or supervisor authenticating the originality of the work.

## VERBS DESCRIBING SKILLS

Activities form into themes such as communicating, showing, analyzing, organizing, creating, managing. Watch for the overuse of a word.

achieved	contracted	evaluated	learned
acted	contrasted	examined	lectured
adapted	controlled	expanded	liaised
addressed	converted	expedited	listed
adjusted	corrected	explained	located
administered	corresponded	expressed	maintained
advised	counselled	extracted	managed
altered	created	fabricated	marked
analyzed	critiqued	facilitated	marketed
appraised	cultivated	filed	measured
arbitrated	cut	financed	mediated
arranged	decided	finalized	met
assembled	decreased	fixed	minimized
assessed	defined	followed	modelled
audited	delegated	forecasted	moderated
balanced	delivered	formulated	modernized
broadened	demonstrated	founded	modified
budgeted	described	gathered	monitored
built	designed	gave	motivated
calculated	detected	generated	narrated
calibrated	determined	guided	navigated
catalogued	developed	hired	negotiated
categorized	devised	hosted identified	observed
chaired	diagnosed	illustrated	obtained
changed	differentiated	implemented	opened
charted	directed	improved	operated
checked	discovered	improvised	ordered
classified	dispensed	incorporated	organized
co-ordinated	displayed	increased	oriented
coached	dissected	informed	originated
collated	distributed	initiated	oversaw
collected	diverted	inspected	painted
combined	documented	installed	performed
communicated	doubled	instituted	persuaded
compared	drafted	instructed	photographed
compiled	drew	integrated	piloted
completed	edited	interacted	planned
composed	eliminated	interpreted	predicted
computed	empathized	interviewed	prepared
conceived	encouraged	introduced	prescribed
concluded	enforced	invented	presented
conducted	enhanced	investigated	printed
configured	enlarged	itemized	processed
considered	ensured	judged	produced
consolidated	established	launched	programmed
constructed	estimated	led	projected

promoted	reported	shared	transcribed
proofread	represented	showed	transformed
proposed	researched	simplified	translated
protected	resolved	sized	travelled
provided	responded	sketched	treated
publicized	restored	sold	trimmed
published	restructured	solved	troubleshoot
purchased	retrieved	sorted	tutored
raised	reviewed	specified	uncovered
received	revised	spoke	unified
recommended	revitalized	started	updated
reconciled	sang	streamlined	upgraded
recorded	saved	strengthened	used
recruited	scheduled	studied	utilized
redesigned	searched	summarized	verified
reduced	secured	supervised	weighed
referred	selected	supplied	welded
refined	separated	talked	widened
rehabilitated	served	taught	won
related	serviced	tended	wrote
rendered	set	tested	
reorganized	sewed	traced	
repaired	shaped	trained	

### ***Transferable Skills Inventory***

Some people have trouble determining the difference between the skills they have acquired and the duties they have carried out. Duties are functions that you did as part of an activity, while skills are the tools you use to accomplish these functions. Listed below is an inventory of skills that are transferable from one job to another, from one employer to another and from one occupation to another. This first list is borrowed from the Transferable Skills Inventory at <http://www.ns.hrhc-drhc.gc.ca/english/career/pathways/look.htm>.

ANALYZING situations or data.  
 ASSEMBLING equipment information.  
 CALCULATING mathematical computations or risk assessment.  
 COACHING, guiding or tutoring.  
 COMPILING data or facts.  
 CONSTRUCTING objects or buildings.  
 COORDINATING activities or events.  
 CORRESPONDING, answering or initiating.  
 COUNSELING  
 CREATING, artistic creations, new ideas or inventions.  
 DECIDING alternatives, resources or materials.  
 DELEGATING tasks or responsibilities.  
 DESIGNING products or systems.  
 DISPLAYING ideas, products or equipment.

EDITING newspapers or magazines.  
 ESTIMATING costs, income or physical space.  
 EVALUATING performance programs, processes or events.  
 FUND RAISING, one-to-one or through media.  
 GROUP FACILITATING, managing group interactions.  
 HANDLING COMPLAINTS, parents, clients, customers, citizens.  
 INSPECTING OR EXAMINING physical objects, financial statements or through test administration  
 INTERPRETING data, legal, medical or technical terminology or other language.  
 INTERVIEWING  
 INVESTIGATING private information, underlying causes or sequence of events.  
 MAKING LAYOUTS for printed or public displays.  
 MEETING THE PUBLIC, receptionist, agency or product representative, salesperson, personal or public servant or tour coordinator.  
 MONITORING progress of people, processes or equipment.  
 MOTIVATING  
 OBSERVING physical circumstances, human behaviors, or changing situations.  
 OPERATING equipment, machines or vehicles.  
 ORGANIZING people, information or events.  
 PLANNING, budgeting, goal setting or scheduling.  
 PROGRAMMING equipment or activities.  
 PROMOTING, one-to-one or through media.  
 RECORDING numerical or scientific data.  
 RECORD KEEPING, logs, files or time sheets.  
 REPAIRING equipment, vehicles, furniture or accessories.  
 SELLING ideas, products or policies.  
 SERVING a product or an individual.  
 SKETCHING pictures, diagrams or charts.  
 SUPERVISING people or processes.  
 TEACHING, formal or informal.  
 TIMING, organizing time or event.  
 TROUBLE SHOOTING equipment or situations.  
 UPDATING information or records.  
 USING INSTRUMENTS, engineering, medical or scientific.  
 WRITING, creative or technical.

This second list is grouped in 5 work-related categories, and is borrowed from the Transferable Skills Survey at [http://www.d.umn.edu/student/loon/car/self/career\\_transfer\\_survey.html](http://www.d.umn.edu/student/loon/car/self/career_transfer_survey.html).

**1. Communication:** the skillful expression, transmission and interpretation of knowledge and ideas.

Speaking effectively	Perceiving nonverbal messages
Writing concisely	Persuading
Listening attentively	Reporting information
Expressing ideas	Describing feelings
Facilitating group discussion	Interviewing
Providing appropriate feedback	Editing
Negotiating	

**2. Research & Planning Skills:** the search for specific knowledge and the ability to conceptualize future needs and solutions for meeting those needs.

Forecasting, predicting  
Creating ideas  
identifying problems  
Imagining alternatives  
Identifying resources  
Gathering information

Solving problems  
Setting goals  
Extracting important information  
Defining needs  
Analyzing  
Developing evaluation strategies

**3. Human Relations:** the use of interpersonal skills for resolving conflict, relating to and helping people.

Developing rapport  
Being Sensitive  
Listening  
Conveying feelings  
Providing support for others  
Motivating  
Sharing credit

Counseling  
Cooperating  
Delegating with respect  
Representing others  
Perceiving feelings, situations  
Asserting

**4. Organization, Management & Leadership:** The ability to supervise, direct and guide individuals and groups in the completion of tasks and fulfillment of goals.

Initiating new ideas  
Handling details  
Coordinating tasks  
Managing groups  
Delegating responsibility  
Teaching

Coaching  
Counseling  
Promoting change  
Selling ideas or products  
Decision making with others  
Managing conflict

**5. Work Survival:** the day-to-day skills which assist in promoting effective production and work satisfaction.

Implementing decisions  
Cooperating  
Enforcing policies  
Being punctual  
Managing time  
Attending to detail  
Meeting goals  
Enlisting help  
Accepting responsibility  
Setting and meeting deadlines  
Organizing  
Making decisions

## Appendix B: Instructions to Volunteers



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### The FuturEd Learning Record Research Project

#### Introduction for LR volunteers:

The purpose of this research project is to explore the value of a Learning Record to individuals, to employers and/or to education/training establishments.

A Learning Record is like an expanded resume. It goes beyond where you've worked or studied to describe what you've learned there and elsewhere. It becomes a summary of all the things you know and can do.

It may be that you are not using your skills and knowledge to maximum advantage to either yourself or your employer. It may be that this Learning Record will help to improve that situation; however, that is the question. Does it help?

#### Instructions:

1. This record is yours. You do not have to show it to anyone else unless you want to.
2. Please read it over from start to finish, first, then begin to fill it out. It will take some time and you'll probably not complete it at one sitting.
3. You can complete it on a computer or on paper. The advantage to the computer version is that you can save it and add to it more easily, now and in the future. Paper is just fine, too.

4. You'll need to spend some time reflecting on the past and on your future. You may be surprised at how much you've learned and what your future possibilities are!
5. If you have trouble understanding any part of it, you are welcome to call me (Kathryn Barker – phone: 604-873-4700 or e-mail: [kbarker@istar.ca](mailto:kbarker@istar.ca)) or \_\_\_\_\_, Manager of Education and Development at the Pan Pacific Hotel.
6. Please complete your Learning Record on or before Nov. 20, 1999.
7. Please keep these research questions in mind as you complete the LR. We will be asking for your impressions, recommendations and plans, either in a group session or individually on Nov. 20-21.
  - ◆ What problems did you have completing the LR?
  - ◆ What recommendations would you make to improve the format/content?
  - ◆ How would you improve the process of completing the LR?
  - ◆ What do you plan to do next with it?
8. After four weeks (week of December 13, 1999), we will question or interview you again about the impact of the LR for you. Please keep brief notes about what you did with your LR.
  - ◆ Who or what you approached, and for what purpose? (e.g., your boss with a training request; a college for advance credit when entering a training program)
  - ◆ What happened? (Positive and negative; planned or unplanned)
  - ◆ What benefit do you see to having your own personalized Learning Record?
9. There are no right or wrong answers. The data we are gathering are opinions. You will have access to the research report when it is finished, and it will be a public document.
10. If you want more information about the research project, FuturEd or the concept of a Learning Record, please check out our web site: [www.FuturEd.com](http://www.FuturEd.com)