



**Workplace Education  
Practitioners' Forum  
Summary Report**

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Workplace Education  
Practitioners' Forum  
Summary Report

Winnipeg, Manitoba  
March 4 – 6, 1999

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# Acknowledgements

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This report summarizes key points of a discussion during a Workplace Education Practitioners' Forum held in Winnipeg, Manitoba on March 4 - 7, 1999.

The event was initiated and sponsored by the National Literacy Secretariat of Human Resources Development Canada. On-site organization was provided by Carmel Edison, Louise Nichol and Margerit Roger of the Manitoba Association of Workplace Educators (MAWEC). A preliminary day of presentations and discussions was organized by Angela Chotka, also of MAWEC.

Besides the National Literacy Secretariat and the MAWEC planning committee, the following people served as an advisory group to provide suggestions and feedback on the initial planning for the event:

- Stacey Huget, British Columbia
- Karen Bennett, Alberta
- Ron Torgerson, Saskatchewan
- Angela Tessier, Manitoba
- Marjorie Davison, Nova Scotia

Their ideas were invaluable in defining the direction and content of the forum discussions.

Drew Henderson (Henderson Consulting and Training) and Barbara MacKay (North Star Facilitating) led the discussions with patience and humour. After the forum, they documented key issues and ideas to serve as the basis for this report.

Finally, thanks to the Workplace Education Practitioners who attended the forum, especially those from across Canada who traveled to Winnipeg in March. Eight provinces were represented, and through the activities, networking and collegial debates a foundation was laid for further discussion on the training and recognition of Workplace Education Practitioners in Canada.

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# Executive Summary

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In the past few years, the training and recognition of Workplace Education Practitioners has attracted increasing attention across Canada. A variety of local and national training initiatives, many of them funded by the National Literacy Secretariat (NLS), have been undertaken. These initiatives (conferences, certification programs, training events, summer institutes) have helped Workplace Education instructors, peer tutors and consultants to enter the field, expand skills or stay abreast of current trends. Shorter workshops have been offered to augment basic training by providing information on more specialized topics. Mentoring and networking, both electronic and in-person, have created other important opportunities for professional development.

Now discussions have turned to ways of documenting and recognizing the growing expertise, so that the continued growth and diversification of the field can be supported.

To explore common needs and interests among Canadian practitioners, and to consider how issues of training and recognition might be approached in the future, the NLS invited a group of field experts to a Workplace Education Practitioners' Forum in Winnipeg, Manitoba in March 1999. This Forum was attended by 30 practitioners with Workplace Education experience in a variety of areas: educational institutions, provincial and federal government, labour, industry, ESL, community-based literacy, train-the-trainer, vocational and rural programming, etc.

## Objectives

First and foremost, the objective of the Forum was to create an opportunity for participants from across Canada to have an initial discussion on practitioner development and recognition. More specifically, the Forum hoped to bring out participants' views on:

- the roles and working contexts of Workplace Education Practitioners in different regions
- the identification of basic competencies required for a variety of practitioner roles
- different methods of professional development and expertise-building
- common needs and interests in training and/or recognition
- potential models for more comprehensive training and/or recognition
- a national communication infrastructure

Based on the collective feedback, a process was to be suggested for addressing issues with broader representation from specific stakeholder groups in the future.

## Summary

The majority of participants considered the Forum a valuable chance to network and review the current situation, particularly because the training and recognition of Workplace Education practitioners has rarely been the focal point of a national discussion. Participants were afforded the opportunity to celebrate similarities in opinion as well as gaining a greater understanding of the diverse nature of Workplace Education across the country. No decisive steps were taken in any given direction, but through the discussions a general consensus emerged on a number of points.

Firstly, the recognition of diversity was fundamental to all discussions. **Different delivery models, working contexts and learner groups require a field of practitioners with a broad range of skills and experience.**

Because of this, the variety of individual professional development paths within the field of Workplace Education was considered a great strength and point of pride. Participants stated that professional development efforts should continue to reflect and support the diversity of the field, responding to different levels of experience as well as to different needs and interests. **The value of a mix of formal and informal expertise-building, specific training, mentoring and hands-on experience was emphasized.** Although professional development efforts might include common elements across the country, participants felt it was important to maintain regional responsiveness. A number of professional development models were discussed.

Next, participants recognized that the diversity of the field – while serving as a strength – could make it difficult to package the work of the Workplace Education Practitioner into a neat list of minimum competencies. Participants re-iterated the role of attitudes, ethics, values and educational philosophy in describing a “good practitioner”. As a result, **national/regional requirements based on competencies were seen as unwieldy and unnecessary for the time being** (set by whom? monitored by whom? required/desired by whom?). Formal recognition could instead be related to training initiatives rather than to national/regional performance measures. Some participants expressed an interest in general “best practices” as an appropriate guide to quality service and programming.

Finally, there was **interest in research for and about practitioners, as well as in improved communication between practitioners in the different regions**, perhaps through some type of electronic infrastructure. Networking, mentoring and information-sharing were seen as vital elements of professional development.

## Suggested Next Steps

After the two days of sessions, participants suggested that, while a number of significant initiatives were already underway to address regional training and recognition needs, it would be valuable to conduct some basic research at a national level. Increased communication between practitioners in different roles and regions was also considered important.

To those ends, it was suggested that the NLS might undertake projects which would:

1. Conduct a demographic study of Workplace Education Practitioners including information on: diversity of roles and contexts, numbers of practitioners, hours worked, education, years of experience, types of experience, specializations, etc.
2. Document past and present professional development paths focusing on entry into the field, professional development, formal and informal means of expertise-building, training needs and interests (present and future), etc.
3. Research and/or develop inventories of competencies and aptitudes that have proven valuable to practitioners in various roles and contexts.
4. Consider professional standards and/or best practices in related areas such as literacy, ESL, adult education or industrial training to see whether certain aspects might be applicable to Workplace Education Practitioners. In particular the 1995 “Best Practices” document released by the NLS and ABC CANADA was to be reviewed.
5. Develop a national communications infrastructure, tapping into existing networks and setting up conference mechanisms such as listservs, chat-rooms, and bulletin boards.
6. Encourage discussions on the intricacies of practitioner development and recognition in local and/or regional forums.

Forward direction in a timely manner was important to this group. Participants indicated that they would be interested in addressing at least some of the suggestions within the next year.



# OVERVIEW

## **Workplace Education Practitioner Forum Lombard Hotel, Winnipeg (March 5 to 7, 1999)**

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### **March 4 Kick-Off Presentations**

- Opening – Angela Chotka, MAWEC
- Welcoming Remarks – Brigid Hayes, NLS, Angela Tessier, MAWEC
- Workplace Education: The Consumer's Perspective  
Dr. Kathryn Barker, FuturEd, Vancouver
- How Can We Prepare to Best Address Our Clients' Needs?  
Sue Folinsbee, TriEn Communications, Toronto
- Models of Accreditation: Innovation and Ideas  
Dr. Robin Millar, PLA Centre, Winnipeg
- Presentations by Forum participants on the training and recognition of Workplace Education Practitioners in their regions
- Presentation of Manitoba survey results, Lisa Petit, MAWEC
- Late afternoon reception

### **March 5 – 6 Forum Discussions (Details on following pages)**

- Welcome and Overview of Forum
- Setting the Context
- Considering Competencies
- Practitioner Development
- Training Models
- Next Steps

# Introduction

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## General Background

For a number of years, the National Literacy Secretariat (NLS) has directly or indirectly funded professional development events for Workplace Education Practitioners across Canada. The majority of these programs were developed to expand the local capacity to address industry's Workplace Education needs. Despite the fact that these programs were developed to meet local needs however, research shows that there are significant similarities between the different training opportunities across the country. Common issues and interests have also become apparent at national and international conferences, through listservs and through networking with colleagues in related training fields.

The increase in professional development opportunities has been accompanied by a growing interest in more formal recognition of skills and accumulated experience. On the one hand, this may be a consequence of the current focus on quality or performance standards in industry and the much-discussed certification of other industry trainers and consultants. However, it also reflects the Workplace Education Practitioners' interest in professionalism ("best practices") and in more advanced professional development opportunities.

The discussion of practitioner training efforts, "best practices" or recognition of expertise raises a number of interesting questions. These questions become particularly significant if issues of training and recognition begin to be considered at a larger-than-local level:

- Who is a "Workplace Education Practitioner"? Do practitioners in various regions define their roles the same way? What contributes to the differences and similarities?
- How have Workplace Education Practitioners developed their expertise and skill? How have formal and informal learning contributed to skill-building? What methods of professional development are seen as most effective?
- What makes for a "good" Workplace Education Practitioner? What knowledge, competencies and aptitudes are valued by different stakeholders? How would these be related to a definition of "best practices" for the field?
- What is considered a sound and effective way of recognizing existing skills and experience? How can recognition models be constructed to remain true to fundamental principles of adult learning? How can it be ensured that "recognition" does not become an end in itself?

- Are there in fact enough commonalities in existing professional development/recognition efforts to warrant the development of a unifying, national perspective? How can national communication between Workplace Education Practitioners be improved?
- Which stakeholders would have to be involved in these discussions?

## Forum Objectives

To begin to look at some of these questions, the NLS held a small-group consultation in Winnipeg in March 1999. The three-day meeting brought together a group of experienced Workplace Education Practitioners, funders and promoters of workplace literacy. The aim was to hold a preliminary discussion on the roles and contexts of Workplace Education Practitioners in different regions, and then to consider the current state and future development of practitioner training. If commonalities were significant, the discussion might turn to the desirability for some training harmonization across the country. This in turn could provide an opportunity to determine potential interest in more formal recognition of expertise. Finally, it was hoped that participants at the meeting would suggest different ways of determining future actions and consultation on these issues, and to determine if there was interest in developing a national communication infrastructure.

In brief, the Forum was to be used as an opportunity to get feedback from participants on:

- the roles and working contexts of Workplace Education Practitioners in different regions
- the identification of basic competencies required for a variety of practitioner roles
- different methods of professional development and expertise-building
- common needs and interests in training and/or recognition
- potential models for more comprehensive training and/or recognition
- a national communication infrastructure
- how to proceed with issues of training and recognition in the future

## **Pre-Forum Planning**

Brigid Hayes of the NLS approached the Manitoba Association of Workplace Educators to organize the event in Winnipeg<sup>1</sup>. Besides the MAWEC sub-committee, which worked on a volunteer basis, a meeting facilitator was hired to assume responsibility for site logistics. To determine the focus of the event, a number of practitioners from different provinces were asked to serve as an advisory group. One conference call was held to discuss key issues and expectations, and to frame the objectives of the Forum. Follow-up communication occurred largely through e-mail.

Potential participants were identified through their previous work in the field. Final participants were selected based on availability, location and roles in workplace education. The aim was to ensure as broad an outreach as possible by including practitioners with experience in a wide range of areas within Workplace Education. Although not participating as representatives of any particular stakeholder group, participants had experience in government, labour, industry, community-based and rural programming on both a national and regional level.

A package of readings was sent to participants in advance of the Forum (see Appendix). Besides documents which had been produced on practitioner development and recognition over the years across Canada, some articles were gathered from the U.S. and overseas. The information described certification programs in other fields, showed skills profiles from related jobs, or suggested research paths that could be undertaken in Workplace Education Practitioner development. The purpose of the readings was to demonstrate the diversity with which the issues of training and recognition could be approached.

Once overall objectives had been determined, participants had been confirmed and readings were distributed, Manitoba facilitators Drew Henderson and Barbara MacKay were engaged to coordinate the Forum activities. General background information, reading materials and meetings helped them to structure the event. Final arrangements for the event were made.

## **Kick-Off Event**

In order to capitalize on the presence of experienced practitioners coming from other regions, MAWEC prepared a one-day professional development event to precede the Forum. The event was open to Forum participants as well as all Manitoba Workplace Education Practitioners.

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<sup>1</sup> MAWEC is an organization dedicated to the support and professional development of consultants and educators working with workplace literacy, ESL, numeracy and upgrading in Manitoba.

This day of presentations and networking served as an introduction to some of the issues which would be discussed during the Forum itself. Speakers shared their views on the work of the Workplace Education Practitioner, presented innovative accreditation models and described professional development initiatives from their regions. A survey outlining some Manitoban views on accreditation and certification was presented.

To round off the afternoon, a reception was hosted by the NLS to allow Forum participants, speakers and Manitoba practitioners to network and share information.

## **Forum**

The following pages provide details on the Forum agenda and results.

# Forum Overview

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The Forum was structured as a series of focused discussions interspersed with “infomercials” which allowed participants to highlight particularly successful or interesting initiatives from their regions. Discussions took place in small and large group sessions, with facilitators using a wide variety of facilitation techniques including flipcharts, brainstorming activities, drawings and creative objects to activate the discussions and capture the information.

The following overview shows how the discussions were organized, and provides an indication of the kinds of information that were being gathered at each point. Where possible, results from handouts, flipchart sheets and brainstorming sessions have been included on the corresponding Charts in the Appendix.

## Agenda

### A. WELCOME AND OVERVIEW OF FORUM

### B. SETTING THE CONTEXT

The purpose of this first section was to highlight common ground, identify potential differences, and illustrate the diversity of the field. It was hoped that some common terminology would be identified for use throughout the Forum. The information gathered was not new, but the creation of common understanding (and identification of points of disagreement) was fundamental to further discussions. Debate around the term “practitioner” was particularly important, as there were significant differences in how the term was used by various participants.

- Chart B1: Identifying Stakeholders, Funders and Potential Program Goals
- Chart B2: Defining the Profession
- Chart B3: Terminology
- Chart B4: Defining Roles of Practitioners

### C. CONSIDERING COMPETENCIES

In this section, facilitators hoped to draw out a discussion of the various skills required for different practitioner roles and contexts, with the assumption that there would be common elements as well as significant differences. By drawing on the discussions and

on information from the broader training field, it was thought that participants would be able to more easily make connections between performance, training and recognition models later in the Forum.

While it did make for some interesting discussions about the role of competencies in defining training objectives or recognition criteria (can a skills inventory accurately reflect what makes someone “good” at their job?) this section of the Forum was considered to be somewhat peripheral to the overall discussion of training and recognition. Some participants felt that it would have been difficult to construct a useful list of competencies within the timeframe of the Forum, especially considering the variety of roles and contexts that had been identified earlier. Others suggested that the primary point of interest should have been on those competencies and aptitudes which distinguish Workplace Education Practitioners from other trainers, adult educators, consultants, technical writers, researchers, etc. Still others felt that developing expertise in the field of Workplace Education was much more a result of experience than training towards specific competencies.

- Chart C1: Differences and Similarities
- Chart C2: Brainstorming Basic Knowledge, Skills and Aptitudes of WEPs
- Chart C2: Ways of Developing Competency

## **D. PRACTITIONER DEVELOPMENT**

Once competencies had been considered for a selection of Workplace Education Practitioner roles, participants were asked to begin thinking about the development of these competencies. The first step was to reflect on development paths that the participants themselves had taken. Instead of taking a linear approach however, one participant made the suggestion that the participants’ paths into Workplace Education could be illustrated by allowing participants to chart their personal paths on a long mural which was hung up in the main meeting room.

The resulting picture showed a multitude of indirect, meandering paths that led through a variety of work and formal training experiences to shop floor experience, mentoring, the development of “street smarts” and other unusual corners of Workplace Education. Although no two people had taken the same path, there were strong themes:

- experience gained through shop floor work
- experience gained from activities other than work
- experience with organizational/cultural diversity
- the gathering of “street smarts” or a “reality degree”

- experience at the “school of hard knocks”
- having had good mentors
- formal education as a stepping stone

The chart clearly illustrated the creative nature of good adult education and reflected the strength of diversity within the field.

## **E. TRAINING MODELS**

Having considered personal development paths, participants were next asked to consider potential models which could be used to structure and perhaps harmonize training across a number of regions. Brainstorming resulted in a number of models, including formal accreditation or diploma programs, mentorship-based opportunities, etc. Four were chosen for a more detailed look:

- Model 1: Harmonized Training
- Model 2: Standards-Based Training
- Model 3: Training through Networking
- Model 4: Training Smorgasbord

## **F. NEXT STEPS**

By the end of the Forum, participants had considered the diversity of roles and contexts in which WEPs work, and had begun to compare strengths and disadvantages of a variety of training opportunities. To move the discussion ahead, a number of suggestions were made.

- Chart F1: Next Steps



# Appendices

## A. Introductory Reading Materials

A variety of materials was distributed to Forum participants before, during and after the meeting. They are listed below. Several of the documents have not been formally published, but are summaries of group discussions made available only to participants. To get information or a copy of the following articles and documents, please contact Margerit Roger (see participant list).

### Documents and Articles

- . - . DACUM: Workforce Education Co-ordinator (Georgia Department of Technical and Adult Ed)
- Bennett, Karen and Nancy Steel. 1997. "Defining Our Work: Developing a Practitioner Profile"
- Folinsbee, Sue. 1998. "An Historical Overview of Practitioner Training and Development for Workplace Education in the Province of Ontario"
- Horsman, Jennifer. 1997. "Where in Anglophone Canada can literacy workers find support for carrying out research and engaging in critical reflection on practice?"
- Huget, Stacey. 1997. "Developing Expertise in Workplace Literacy: Issues in Practitioner Training"
- Huget, Stacey. 1998. "Accelerated Training for Workforce Literacy Practitioners in British Columbia"
- Kelly, Shannon. 1998. "Determining the Road Ahead: A Discussion Paper on the Professional Development and Certification of Workplace Education Instructors in Nova Scotia" (Association of Workplace Educators of Nova Scotia)
- Lagogianes, Betty. 1996. "The Development of Draft Core Competencies and Skills for W/WEBS Practitioners" (London, On: Multicultural Workplace Programs Inc.)
- Lee, Chris. 1998. "Certified to Train" in *Training Magazine*, September 98

- MacLeod, Carol. 1995. Principles of Good Practice in Workplace/Workforce Education: A Report on the Think Tank (ABC Canada and NLS)
- Roger, Margerit. 1999. The Maturing of a Profession: An Overview of Workplace Education Practitioner Development Opportunities” (NLS)
- Roger, Margerit. 1997. “Professional Development for Workplace Instructors: Options and Opportunities”
- Rowen, Norman S. 1998. Another Step Forward: A Discussion Paper of Recognition for Adult Literacy Practitioners (Ontario Literacy Coalition Taskforce on Literacy Worker Recognition)

## Websites

Olson, Susan J. Competencies of Two-Year College Technical Instructors and Technical Trainers: Similarities and Differences"

(<http://scholar.lib.vt.edu/ejournals/JITE/v32n1/Olson.html>)

University of Calgary, Master of Continuing Education: Learning in the Workplace

([www.ucalgary.ca/UofC/faculties/CTED/couch/mee2.html](http://www.ucalgary.ca/UofC/faculties/CTED/couch/mee2.html))

Workplace Trainer Competency Standards, National Assessors and Workplace Trainers

Body, Australia ([www.ozemail.com.au/~humlearn/wptrain1.html](http://www.ozemail.com.au/~humlearn/wptrain1.html))

Prior Learning Assessment and Recognition ([www.plar.com/about\\_plar/index.html](http://www.plar.com/about_plar/index.html))

# Setting the Context

## B1: Identifying Stakeholders, Funders and Potential Program Goals

To begin the Forum, participants brainstormed a list of diverse stakeholders in Workplace Education, their financial and in-kind support, and possible program goals.

<b>STAKEHOLDERS</b> Any group with an established interest in Workplace Education	<b>FUNDERS</b> Capital letters indicate major funders / supporters	<b>POSSIBLE PROGRAM GOALS</b> Not related to specific stakeholders or funders
Employers	YES	Safety
Labour	YES	Policy Development
Volunteer Non-Profit	Yes	Literacy & Numeracy
Learners	Yes	Organizational change
Practitioners	In kind	New machinery, products, services
Provincial Gov'ts.	Yes	Improved employee relations
Municipal Gov'ts.- Economic Development	Yes	Job security/lay-off avoidance
Sectoral Associations & their regional training committees	Yes	Union organizing
Labour Force Boards	Yes	Job mobility
Post-secondary Educational Organizations (colleges, universities)	Yes	Empowerment
Employers' associations	Yes	Return on Investment (ROI)
Vendors	Free product	Global competitiveness
Literacy coalitions	Yes	Certification ("tickets")
Supervisors & management	Yes	Industry certification (ISO)
K-12 school system		Collective guilt; social conscience
Federal gov't (HRDC)	YES	Life-long learning culture
Consultants	Indirectly	Dual development (socio-economic)
HR dep'ts (corporations)	Yes	Transfer of learning
Labour Federations	Yes	Identification of training needs
Brokers		Partnership building
"Community"	In kind – space, ads, support	Increased involvement by employees & management
Apprenticeship Commissions	Yes	Advocacy; lobbying
Professional associations	Space, resources, speakers	New requirements for Grade 12
Joint associations (labour/business)	Yes	Innovation by practitioners, researchers, To generate solid baseline data Cross-cultural development Preparation for further training Practitioners: personal growth, credibility, quality learning

## Setting the Context

### B2: Defining the Profession

After small group discussions describing key elements of Workplace Education, a small group of participants prepared the following composite definition of the field.

**“The field of Workplace Education should encompass collaborative, responsive, intentional activities founded on principles of Adult Education, designed to further learning opportunities and events, applicable to work in Canada.”**

Other definitions:

- Workplace Education is a collaborative effort to provide opportunities for essential skills learning.
- Workplace Education is ...intentional and responsive education through the workplace.
- Workplace Education is a delivery model that responds quickly and flexibly to the essential skill gaps/needs of employees in the context of their work needs
- Workplace education encompasses partnership-based research, promotion, development, delivery, or evaluation activities designed to further quality learning opportunities that enhance the essential skills of the Canadian workforce.
- Workplace Education is:
  - a sustainable strategy for dealing with change
  - planned and implemented with all stakeholders
  - formal and informal learning based on principles of adult education
  - training and development and company practice
  - continuing support for the change process

# Setting the Context

## B3: Terminology

### **Workplace Education Practitioner?**

Part of the discussion focused on terminology used in different roles and regions. The terms “Workplace Education Field”, “Workplace Education Person” and “Workplace Education Practitioner” were used throughout the Forum to include not only educators and consultants, but also funders, and government and labour representatives working in the field.

Further discussion from the Forum:

- What other fields use the word “practitioner”? “Practitioner” suggests front-line, direct contact, but there are lots of roles within the field of Workplace Education
- Terms others use: Workplace Literacy Education, Workplace Specialist, Training Specialist

### **Workplace Education?**

- Other “terminology tangles” included:
  - worker education/workplace education/workforce education

### **Certification/Accreditation?**

Confusion around these terms seemed to relate to the level of recognition (how official is this?) and the definition of the recognizing body (from a formal body or as a result of a training program).

### **Standards/Best Practices?**

Discussion related to whether or not one was more exclusionary than the other was, for e.g. did best practices “guide” without insisting, while standards explicitly state a minimum that might or might not be met?

### **Literacy?**

- literacy/numeracy, essential skills, basic skills, foundation skills

## Setting the Context

### B4. Defining the Roles

All the participants brainstormed potential roles played by Workplace Education Practitioners in different contexts. The chart below shows the results of the brainstorming (reduced to eliminate duplicate entries), with broad general headings given to similar roles.

<b>Facilitator Instructor</b>	<b>Assessor</b>	<b>Developer</b>	<b>Administrator</b>	<b>Marketer Promoter</b>
Learner Peer Instructor Communicator /listener Entertainer Instructor Mentor Coach Facilitator Educator Train the trainer Trainer Mediator	Evaluator Tester Assessor Needs analyst -organization -individual -task analysis -training	Program planner Developer: -materials -curriculum -program -testing Designer	Project manager Program manager Administer Co-ordinator Administrator \$ Manager	Marketer Promoter -present -market Awareness- raiser Advertiser
<b>Writer</b>	<b>Trouble- shooter</b>	<b>Researcher</b>	<b>Broker</b>	<b>Catalyst/ Partnership -builder</b>
Proposal writer Writer	Mediator Liaison Negotiator Diplomat Counselor Advocate	Researcher	Broker Negotiator Advocate -gov't lobbying Policy maker Broker - partnership Developer	Build capacity -practitioners - workplaces -stakeholder organizations Change agent

## Considering Competencies

### C1. Differences and Similarities

Before looking at competencies of specific WEP roles, participants considered some of the KSAs identified by the America Society for Training and Development for Trainers. The underlying aim was to find differences between Trainers and Workplace Education Practitioners.

<b>Competencies</b>	<b>Select KSAs to reflect competent WEP in this role</b>	<b>Competencies for consideration (Taken from Trainer profile)</b>
<b>SKILLS</b>		Presentation, negotiation, interpersonal communication, marketing, networking, computer competencies (word processing, spreadsheets, internet applications), analyzing, organizational and time management, problem-solving, group dynamics, facilitation, program development, observation, feedback and coaching,
<b>KNOWLEDGE</b>		Business (e.g., expectations, conventions, trends), government, field of literacy, decision-making, adult learning principles, training cycle, learning styles, program planning, workplace culture and politics, labour culture, assessment and evaluation techniques, best practices, RAL, PLA, negotiation strategies, plain language principles, research methodologies, workplace legislation, current affairs, diversity and equity issues, organizational development/organizational behaviour, H.R. function, program evaluation
<b>ABILITIES</b>		Work independently, manage stress, write clearly and concisely, data analysis, research, patience, flexibility, tolerance, motivate learners, use variety of instructional methods, discerning, empathetic, openness to new experiences, collaboration, having a sense of humour, seeing the big picture (visionary thinking)....
<b>OTHER</b> (physical, work environment)		Stamina, stress resilience, “thick-skinned”

## Considering Competencies

### C2: Brainstorming Basic KSAs of WEPs

In small groups, participants identified some of the basic competencies that might be valuable to a variety of roles. No editing has been done from the original flipcharts.

<b>Assessor</b>			
<b>Knowledge</b>	<b>Skills</b>	<b>Aptitudes</b>	
<u>Information gathering/</u> <u>Interviewing</u> (ethnographic research): - Open-ended questions - Active listening - Asking with curiosity/interest - Continuous clarifying, probing - Note-taking <u>Ongoing analysis, analyzing data:</u> - Categorizing - organizing - summarizing - synthesizing - extrapolating <u>Planning the N.A. strategy with partners:</u> - Working with stakeholders - Relationship-building: flexibility, respect, patience <u>Information Management:</u> - Word processing - spreadsheets - Database programs - Writing - Clear language - document design <u>Presentation:</u> Oral communication	Issues involved in organizational change – when to probe, pick up at end	Discretion Intuition	This profile mainly addresses an assessor who does an organizational needs assessment including: industry, organization, occupation profile, individual profile. In the role of assessor, there is also need to conduct ongoing assessment and evaluation. A program instructor must also be able to do evaluations.



<b>Curriculum Developer</b>			
<b>Knowledge</b>	<b>Skills</b>	<b>Aptitudes</b>	
Write statements of performance objectives Building flexible emergent curriculum Interpret: apply needs assessment Finding and adapting Contextually relevant	Subject content Knowledge Principles of Adult Ed Understanding the needs of the deliverer Evaluate Learner centered	Good analytical skills Flexible, versatile, resourceful, creative	
<b>Researcher</b>			
<b>Knowledge</b>	<b>Skills</b>	<b>Aptitudes</b>	
Reading comprehension Speaking Writing (clear) Negotiation Presentation Problem-solving Synthesizing Observation Questioning Interviewing Job profiling Cross-cultural communication	Information systems Information collection Techniques: -qualitative and quantitative Information analysis Information formatting Information dissemination Job probing Applied content (action research) Context/industry knowledge The field of workplace education (essential skills)	Discriminate between relevant & irrelevant info Synthesize pieces of information	Other attributes: Perseverance, independence, integrity, discipline, quick learner, ability to “fit in”.
<b>Troubleshooter</b>			
<b>Knowledge</b>	<b>Skills</b>	<b>Aptitudes</b>	
Listening Analytical Multi-tasking Meet everybody’s “needs” Strategic analysis	Sociology of the WP Politics of the “moment”  Visualization of the future Broker within WP/Union	Can define own vision Ability to use a variety of strategies Risk-taker Diplomat Realistic Creative Non-judgmental	

Presentation Interpersonal Cross-cultural Analytical Critical components Negotiating	Understand role of WPE *Include all knowledge and competencies listed in original exercise.	Respect Vision, Astute Versatility Behavioural maturity	
<b>Administrator</b>			
<b>Knowledge</b>	<b>Skills</b>	<b>Aptitudes</b>	
More crucial to have underlying skills for workplace education Have to learn what, how, who to ally with Supervisory – supervising teachers is difficult- innovative, independent people are difficult	Corporate experience and perspective Labour perspectives Know what's necessary to recognize in person they hire	Ability to wear different hats and speak the languages of floor/CEO Function in a multi-level environment and recognize skills in people hired Able to hone essential skills training Visionary – if you do this today, what happens tomorrow? Future trends: where each individual goes – end product – often helps Aware of \$ Make the leap from training to education Collaborative, co-operative – learn to argue education views to the win/win.	Harder for educator to learn business/corporate than corporate to learn essential skills training. You are the calming voice between union and company N.B. Include all KSA's on accompanying page (given in exercise on industry trainer)

## Considering Competencies

### **C3: Ways of Developing Competencies**

Participants suggested ways in which competencies could be developed. The aim was to answer the question “I think we could best develop our competency if ...”

- Paradigms were built on recognition of prior learning and experiential learning to produce entrepreneurial experience.
- We had the means to develop different kinds of expertise but all would be viewed as equally valuable.
- We provided people with professional development opportunities, not gate-keeping
- There was a mechanism for training that addresses emerging skill requirements. We are also adults who are still learning.
- A philosophy needs to come through in Workplace Education.
- We had regular update of activity among ourselves; avoid reinventing the wheel.
- We could develop competency lists and have them validated by those working in the Field. List what is not good practice too.
- The competencies were organized, acceptable, accessible, and available.
- Someone takes charge at the national level or takes a national approach.
- We leave the instructor/teaching roles at the provincial or regional level.
- We establish a process for revision and maintenance.
- There are continuing opportunities to take new projects, new works, work with others in non-related fields.
- Broaden and develop our networks (personal, electronic).
- Develop a common set of good practices that cut across all roles, then offer training to develop them.
- Come back to another think-tank wearing hats specific to our real-life roles (labour, funder, instructor).
- Gather profiles of who we are (age, location, current projects).
- It didn't cost big bucks; if there were no financial disincentives.

# Practitioner Development

## E1. Models of Training

### Introduction

A representative from the Ontario Literacy Coalition provided an overview of the research on certification “pros and cons” developed for community-based literacy programs in Ontario. Forum participants then compared four potential models of training and recognition for their relative merit.

### Model 1: Harmonized Training

This model included a sequence of training steps that would allow practitioners to approach training from differential skill bases. Practitioners new to the field could address issues at an introductory level; experienced practitioners could focus on specializations or more advanced levels of training. Initial comments from the group that presented on this model included the following:

- Use technology in existence to drive this: process, communication, training
- Consultation must include all relevant stakeholders
- The proposed model is a basic package. It doesn't include everything, but it's a place to get started.
- Need to monitor and update so 'modules' do not become esoteric
- Need to find out level of commitment to sharing

### The Four-Step Process

Step 1 – Agree on core competencies (KSAs)

Step 2 – Develop a multi-level curriculum (& alternate delivery where these can be found) to meet the needs of diverse roles

Example:

Sample Topics	ONA	Research Methods	Plant/union structure	?	?
Introductory	XXX	XXX	XXX	XXX	
Advanced	XXX	XXX			XXX

Step 3 – Develop and offer ‘Train-the-Trainer’ across country

Step 4 – Regional use & customization

On-going evaluation, revision, development from steps 2-4

## **Model 2: Standards-Based Training**

This model of training, perhaps the most structured of those considered by the small groups, revolved around the idea of performance standards for Workplace Education Practitioners. The advantages and disadvantages were summarized by the group as follows:

### **Possible Purposes of Performance/Training Standards**

- Something to design training around
- Recruitment benchmark for hiring people
- Help inform people about what is likely to be more in demand for the future
- If there are no “standards”, it’s hard to debate other options
- Provides overarching goals , e.g. being learning-centered
- Existing standards, unwritten and informal, may be a good beginning point
- Suggest reading Norman Rowen’s paper (Another Step Forward: A Discussion Paper on Recognition for Adult Literacy Practitioners August 1998)

### **Problems with Standards**

- Rigidity
- Who are the standards for: national standards by unions, instructors?
- Areas of focus for specific roles may not be clear: person-specific goals, overall competencies, etc.
- May be a bit of a rush to push standards on the WEP. Suggest doing a research paper on this.

## **Model 3: Training Through Networking**

The third model discussed for its potential merits consisted of concentric circles which each represented layers of communication and networking that could result in professional development. Each ring represented different training opportunities:

### Innermost circle

- Face to face communication between colleagues, mentors, peer tutors, confidantes, etc.
- Colloquia

### Middle circle

- Collaboration, partnerships and publishing
- Industry tours, bursary, travel
- Electronic bulletin boards

### Outer circle

- Broader community networks
- Listservs and newsletters
- Exploring resources (libraries and universities)

### Across the middle and outer rings

- Conferences and workshops
- Professional associations
- Telecommunication (e-mail)

## Model 4: Training Smorgasbord

This model was based on the idea of a changing “menu” of training choices which adapts to reflect emerging and on-going training needs. Perhaps based on fundamental areas of skill or knowledge, the menu would allow WEPs to choose training most appropriate to individual roles and contexts. The training/smorgasbord image was conveyed as follows:

- You need to know all available ingredients (current trends and needs) so you can chose which menu items (training opportunities) to prepare / choose
- “Bites” vs. whole portion (take what you need at the time – workshop or program)
- Alone or in groups
- No specific order would be required, but categories could be suggested (different situations may require different training priorities, but a “good training diet” could be suggested)
- Serve yourself different dishes or portions (practitioners are adult learners who can address their own needs)
- Selection changes over time but you may need to keep a balanced “meal” (training plan) in mind
- Some areas have particular dietary needs (special training needs) or may keep their ‘regional specialty’ to themselves (regional issues)
- Add “dishes” or take things away as needed (as new topics come up and others become obsolete, changes are made)
- Different individuals have differing appetites (workloads, timelines, commitment, etc.)

## F1. Next Steps

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To end the Forum, participants reflected on the topics they had discussed over the past two days and made the following recommendations:

1. Conduct a demographic study of Workplace Education Practitioners including information on: diversity of roles and contexts, numbers of practitioners, hours worked, education, years of experience, types of experience, specializations, etc.
2. Document past and present professional development paths focusing on entry into the field, professional development, formal and informal means of expertise-building, training needs and interests (present and future), etc.
3. Research and/or develop inventories of competencies and aptitudes that have proven valuable to practitioners in various roles and contexts.
4. Consider professional standards and/or best practices in related areas such as literacy, ESL, adult education or industrial training to see whether certain aspects might be applicable to Workplace Education Practitioners. In particular the 1995 “Best Practices” document released by the NLS and ABC CANADA was to be reviewed.
5. Develop a national communications infrastructure, tapping into existing networks and setting up conference mechanisms such as listservs, chat-rooms, and bulletin boards.
6. Encourage discussions on the intricacies of practitioner development and recognition in local and/or regional forums.



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# PROGRAM EVALUATION

## Workplace Education Practitioners' Forum

### 1. What I thought was the most valuable about this two day think-tank was:

- networking
- thinking about the issues with colleagues
- Defined context for further discussion and action
- Great time
- NLS objective/framing well articulated and useful
- Nothing was assumed, every ambiguity was explored → this will hope turn the 'pre-meeting' into a meaningful 'meeting'
- Opportunity to define workplace roles and put forward ideas for moving forward
- Meeting – putting faces to some of the names I have seen in print.
- Hearing of national concerns was also good
- Great opportunity to network – understand national perspective –get a sense of diversity, the many pros and cons around issues, the uniqueness of W.E.
- Watching your process
- Interacting with colleagues from across the country
- Networking
- Different points of view of certification and accreditation
- Getting a snapshot/meeting people doing the same thing (different language)
- Reconnecting with peers and making new friends
- Networking
- Sharing information
- Understanding of this issues
- Networking and the struggle – with skilled facilitation
- Meeting the people, lessening the isolation
- Hearing perspectives direction from action oriented committed people
- Face to face contact, support and idea generation
- Networking with others
- The coming together of people from different regions
- The informal discussions – the opportunity to learn from others
- Networking – putting names to faces
- Having the opportunity to meet with other WP practitioners and realize the scope of WP Ed.

## 2. What I found most useful and I can apply in my work was.

- Promise of resource sharing and coming together re training for the field
- Loved the style of the presenters, colourful, encouraging, fun – very well done.
- Infomercials
- Networking and incidental information
- Broader perspective on ‘the field’
- Encouragement to carry on
- Work on competencies
- Thinking on recognition
- Wrap-up thinking
- Better understanding of the complexity of workplace education. Networking was most useful to me.
- Many ideas from best practices – ideas for ONAs
- Too many things to mention here
- An understanding of transfer of learning and the lines that it takes
- Defining the field as much broader than originally thought
- Our work is very valuable and valued by many.
- Good practice of trainer
- Information sharing re colleagues
- Information about HACCP – which was entirely new to me
- Information about the BC electronic network and a software platform “First Class” that I was unfamiliar with.
- Help structure PD
- Connections – for moving to new areas
- Definitions and critical thinking
- Infomercials
- Nothing immediate, but I know it will come – just as with the Best Practices Think Tank
- Concepts in recognizing learning/training achievements
- Facilitating tips
- Ideas from infomercials
- Books and other document titles
- Best practices
- Knowing more about my place in the ‘rainbow’ and about the scope. There was less passion for standards etc. that I expected
- Opportunity to access materials from other participants
- Connections to other practitioners who are working in similar situations

### 3. What was of little or of no value for me:

- Felt we spent a bit long on competencies - that this was too ambitious for the time we had.
- Whether we see it at the time, everything has value.
- Instructors' roles
- All was of value to me
- Certification issue
- Tuned out sometimes! Task vague
- Room long and not connected
- The competency listing
- The first day was problematic – no need to rethink 'job competencies' in a group
- All the calories
- Getting bogged down in terminology

### 4. Overall I would rate this session as:

Not useful 0      somewhat useful 1      useful 8      very useful 10

### 5. The facilitators' style was:

Not helpful 5      somewhat helpful 3.5      helpful 10      very helpful 5

- The facilitators mis-read our needs and sophistication

### 6. The pacing was:

Too slow 0      a little slow 2      too fast 3      just right 13

- Although upon reflection due to the goals and formative nature of discussion – nor far off what was needed.
- Overwhelming at times.
- Pushed and pulled, but could not expect more when working with a room full of facilitators
- Slow at times but how can that be avoided?

## **7. I think future Workplace Education Practitioner Meetings or conference could be improved if:**

- Clear, articulation of goals before and at start of training
- Acknowledgement up front that we will all arrive at a moment of frustration at some point in the process – so you're prepared for it.
- Better room logistics
- People could arrive the day before the start of the meeting and a better meeting room – with windows
- Agenda could be provided ahead of time
- The agenda were a little more clearly laid out prior to the session.
- We had more like this
- Only if Carmel is hired to organize them!
- There was a side section on computer/technology/internet use so people could go online, sign up to Bulletin Boards and listservs and get help doing it right away.
- Planners made room for facilitators from with the group – content/value knowledge would help.
- At this first step, it is difficult to say
- We came and set the goals, planned the meeting and evaluated as if we were a group of adult learners.
- More time
- Had more time to network with cohorts

## **8. One more thing I would like to say is:**

- Thank you for the opportunity to come.
- Thank you
- Thank you for including me
- I would like a follow-up to go more into details in terms of standards, training and networking.
- The participants should have been polled or surveyed up front beforehand re: what they expected from such a think thank/workshop etc.
- Onward into the fray!
- It was a wonderful thought provoking two-day session – long live the soul of workplace education.
- Sometimes I found the process confusing, not clear.
- Keep some focus on skills and knowledge or awareness of skills/knowledge needed to have effective learning take place. How does reading happen? Math? Other?
- A big thanx to Brigid for her attitude and passion for the field.
- Thanks for trying to pull this off at step 1.
- Thank you for the opportunity to be here!