

**First Sites Report: Collective Consultation on
Workforce/Workplace Literacy**



February 2003

Acknowledgments

Many thanks to the first site network executive directors and workplace coordinators for their input and feedback on many drafts of this report.

Acknowledgment to the Ministry of Training, Colleges and Universities and the National Literacy Secretariat, Human Resources Development Canada for financial support of both the work of the Ontario Literacy Coalition and the first sites.

This report was prepared by OLC staff Sue Folinsbee and Lorri Sauve.

Executive Summary

The five first site networks, Literacy Ontario Central South, Literacy Link Niagara, Mid-North Adult Learning Network, Project READ Literacy Network, and QUILL Learning Network, have provided MTCU with information regarding the piloting of the workplace/workforce initiative in this report. This is a mid-term report that covers the work of the first sites up only until the end of October 2002.

Current Realities

Coordination of Workplace Literacy Activities

- All five networks indicated that they were pursuing or planning to pursue some version of the collaborative broker model. Some networks are still focusing on the workforce development stage and have not yet decided on the model they will be implementing. Networks emphasized the need for agencies to carve out specialized niches within the model.
- Current issues in developing a coordination strategy include developing trust, finding convenient times to meet, fear of competition, and resistance. Some issues that will require further discussion include the negotiation of fees for training and organizational assessments. Additional concerns that will have to be resolved are whether contracts have to come through the network if the agency has had a previous contract with the business, and how to accommodate new agencies coming on board.
- There was consensus that more developmental time and resources are needed to prepare to market, coordinate and deliver workplace literacy. The networks stressed that workforce readiness needs to be developed first, and that workforce and workplace should not be developed concurrently. Networks assumed that agencies were more workforce ready than they really were. Therefore, doing workforce and workplace literacy concurrently became a “double whammy.”

Workforce Literacy

- All networks identified positive changes that had occurred as a result of being a first site. They indicated that there was more familiarity with workforce and workplace literacy on the part of LBS programs. However, networks stressed that they were concerned about programs' readiness to deal with workforce literacy. They stated that the training provided was just the tip of the iceberg, and that a full year just to focus on workforce readiness was needed.
- All networks stressed the importance of gathering and using workforce authentic materials to improve workforce literacy services in their communities. They also said that continual communication and clarification of the purpose and importance of the workforce initiative was necessary. They said they needed financial and other kinds of support to improve workforce literacy services. They emphasized that *all* LBS agencies need to develop their capacity to deliver workforce literacy.

Workplace Literacy Marketing

- The networks are in varying degrees of development with respect to marketing. They will not have results until early in 2003.
- The networks stressed that the danger of marketing, before ready, puts the project in jeopardy. They emphasized that marketing is definitely the last stage of development.

Workplace Literacy Professional Development

- Networks agreed that in the current situation they have spent a lot more time focusing on building the capacity of LBS agencies to deliver workforce literacy than they anticipated. As a result, marketing activities for workplace activities have been delayed.

- Networks reemphasized the need to offer orientation and training to build workforce capacity first before moving on to workplace literacy. Training and orientation for workforce and workplace literacy must address the needs of a) administrators and b) practitioners.

Tracking

- Networks highlighted the need to track and evaluate workforce and workplace literacy differently and separately. Workforce and workplace literacy have different levels of accountability and progress looks different for each one.
- Generally networks are using the readiness scale to track workforce readiness and develop work plans for workplace literacy. Progress on work plans is used to track workplace literacy.

Summary of Recommendations

1. Allow 3-5 years for the development of a successful business model for workplace literacy with program delivery in place. Allow a minimum of two years of development time for a phased-in approach.
2. Provide \$50-60,000 per year per network to develop and maintain a successful workplace literacy model as part of its workplace literacy strategy.
3. Track the actual costs of developing and maintaining a successful workplace literacy model.
4. Provide a year to develop and/or assess workforce readiness on the part of literacy agencies before developing a model for workplace literacy.
5. Provide comprehensive training in workforce literacy that corresponds to both LBS administrator and practitioner experience and expertise.

6. Provide financial support to collect authentic workforce materials by community.
7. Place the same/consistent expectations of all MTCU programs (not just pilots) to prepare them to deliver workplace training.
8. Develop and implement (done by the provincial government) a provincial message to promote workplace literacy to supplement local marketing efforts.
9. Ensure comprehensive and extensive orientation and training for workplace literacy. Training and orientation must address the needs of both administrators and LBS practitioners and must respond to varying levels of expertise and experience.
10. Communicate more clarity with respect to what constitutes success in workforce and workplace literacy.
11. Identify and develop additional evaluation tools that measure progress.
12. Reform the readiness scale with more specific indicators of success so that programs can more easily measure progress and success.
13. Conduct a needs assessment with first sites after a full year (March 2003) to determine priorities for developing workforce learning and assessment tools.

I. Introduction

The five first site networks, Literacy Ontario Central South, Literacy Link Niagara, Mid-North Adult Learning Network, Project READ Literacy Network, and QUILL Learning Network, agreed to provide MTCU with information regarding the piloting of the workplace/workforce initiative. This collective consultation was undertaken in order to determine how the initiative was progressing, what was working, what was not working, and what could be done in the future for other networks and their agencies who undertake this initiative. At the request of the first sites, the Ontario Literacy Coalition put this report together as part of its project “Stay Tuned In” to Workplace Literacy: Developing a Practitioners’ Network. The goal of the project is to provide support to the first sites through a combination of different methods after initial training sessions.

This is a mid-term report that covers the work of the first sites up only until the end of October 2002. It responds to a number of questions posed by MTCU about the work of the first sites. At the present time, the questions could not be fully addressed. The first sites were only halfway through the project at the time of this reporting back. The networks also indicated that the 6-week OPSEIU strike caused some initial delays.

The networks agreed that the final report from the first sites should include recommendations for other networks and agencies that may be implementing workplace literacy in the future. This report includes both the progress and process of the first sites in order to help other communities learn from their experiences. However, they felt strongly that until the project assessment is complete, full recommendations to other networks should not be made public.

This report is organized with each question stated in bold and the answers from the networks recorded below the question. The answers reflect the current reality as well as recommendations for the future. There was consensus from all five networks on key issues and recommendations.

II. First Site Networks' Responses to Questions

Coordination of Workplace Literacy Activities

1. Briefly describe the models used by your networks and participating delivery agencies to coordinate the marketing and delivery of LBS services to workplaces in your communities.

All five networks indicated that they were pursuing or planning to pursue a version of a collaborative broker model. Some networks are still focusing on workforce development and have not yet decided on how they will implement this model.

A new collaborative broker model¹ emerged throughout the process of this project. It is defined as a model of centralized management of workplace literacy delivery in which the network:

- coordinates the activities of the group
- drafts an agreement that lays out mutual responsibilities and unique training niches of each program
- pursues, develops and negotiates workplace training opportunities on behalf of member programs
- conducts the business needs consultation
- markets a seamless menu of basic training to the business community.

The role of the programs in the collaborative broker model is to:

- develop a unique niche of training
- approve an agreement that lays out mutual responsibilities and a program training niches
- deliver training at workplace.

Networks are at different stages of working out agreements of how they will work with their member agencies. Some networks are attempting to have partnership agreements signed by interested member agencies including a “Commitment to Cooperation” which will include policies and procedures for how this initiative will roll out in its region. In another case, the partnership agreement focuses on consensus decision-making.

¹ First Sites Working Group

In a third case, the network is marketing the opportunity to purchase training to employers and the network will be the point of contact for employers interested in this option. The training opportunities will be brokered to participating agencies based on geography, size of company and employees needing training

One network is focusing on workforce literacy at this point because their member agencies are strongly committed to workforce but lack the desire and capacity to work directly on workplace literacy. Concentrating on building capacity in workforce, will also build capacity in workplace literacy. This network is still working out the possible roles of interested agencies and what they might be.

2. Why did you decide to proceed with these models? What is the role of the network in these models? What are the roles of the delivery agencies?

All networks discussed the need to coordinate workplace training in order to support consistency, seamlessness, and accountability. They all felt that having one point of contact would increase professionalism.

Networks indicated a variety and range of responsibilities that included:

- conducting organizational needs assessments
- defining responsibilities of the parties
- evaluating services
- determining future training needs
- coordinating training for LBS practitioners
- sharing information with other first sites

Responses indicated that through project dollars, networks have the capacity to broker a workplace literacy project while agencies do not have the capacity. The role of agencies is to deliver quality training and ensure that their practitioners are ready to deliver workforce and workplace training.

Current activities that networks are presently focusing on include:

- developing workforce literacy
- improving networking with local employers
- expanding the membership of its Workforce Advisory Group to include members from the business community
- developing a database of workplace resources
- conducting best practice research
- communicating with other agencies and networks already involved in workplace literacy

The networks agreed that evaluation of the new model was necessary and important.

3. What were some of the coordination issues identified during the development of the models? How have these been resolved? Are there any remaining issues?

All five networks said that carving out niches, specialized areas to focus on, was important in facilitating coordination. However, they indicated that agencies may not see the necessity of sticking to niches.

Once agencies carve their niches, though, they may be more interested in moving from workforce to workplace literacy. Moving from workforce readiness to workplace literacy is a critical issue identified by all networks.

Some of the current issues identified were:

- the need to develop trust with agencies before anything else can proceed
- finding a convenient time when participating agencies and the network can meet
- fear of competition among participating agencies

- the resistance of agencies that used to be involved in workplace literacy years ago (these agencies felt that it was tried before and that employers would not pay for these services)

Several key issues requiring more discussion were identified. These included:

- the negotiation of fees that individual programs will charge to deliver training, and what networks will charge to conduct an organizational assessment (for those networks providing services)
- whether contracts have to come through the network if the agency has had a previous contract with the business
- clarity about the role of networks with respect to agencies; where is the line between being supportive and encouraging, and being co-responsible for the outcomes?
- how networks will accommodate new agencies coming on board

4. How do these models accommodate delivery agencies from the different sectors and streams in each community?

Where applicable and feasible, first site agencies included a range of streams and sectors. Each network has, or is planning to work with agencies to develop delivery niches.

Where this activity occurred, niches were determined by a variety of methods including:

- occupational sectors
- geography
- operating with the same niches developed through the LSP process

Regardless of how the niches are determined, networks agree that this is a process that takes time, trust and negotiation among agencies involved. The process needs to have a purpose and be transparent.

5. If these models were to be used in other communities, what would be the best way to help other communities adopt them?

There was consensus that more developmental time and resources are needed to prepare to market, coordinate and deliver workplace literacy. More time is needed to develop workforce readiness, trust, protocols, policies and values, and training. The networks stressed that workforce readiness needs to be developed first, and that workforce and workplace should not be developed concurrently. Networks assumed that agencies were more workforce ready than they really were. They found that most agencies needed to increase their use of work authentic documents. Doing workforce and workplace concurrently became a “double whammy.”

Funding for staged development in three phases is necessary starting with workforce readiness, moving on to developing internal and external relationships and finally to operating a successful business model with programs in place.

Orientation, training, and ongoing support are key for networks getting involved in workplace literacy. Suggestions for support for new players included:

- developing a mentoring system or support group with experienced networks and programs helping not-so-experienced agencies
- providing an opportunity for questions and answers with a panel of experienced representatives (network, community-based, colleges, school boards, trainer, client) using the collaborative broker model; other communities can then assess whether it would work for them
- ensuring that other networks read the project reports on workplace literacy from Project READ, ABEA and Midnorth

Finally, identifying introductory niches was cited as important.

Recommendation:

- Allow 3-5 years for the development of a successful business model for workplace literacy with program delivery in place. Allow a minimum of two years of development time for a phased-in approach.

Phase 1: Develop workforce readiness. Ensure that literacy agencies are able to deliver workforce literacy.

Phase 2: Develop internal and external relationships. This includes bringing agencies to the table to develop trust, protocols, policies. It also includes costing out services, and orientation and training in workplace literacy. Agencies also have to develop policies and values within their own organizations. This phase also needs to focus on building relationships with other organizations in the community.

Phase 3: Begin marketing workplace literacy and offering programs, if feasible.

6. What are the deliverables that MTCU can expect from these models of coordination and how would we measure the effectiveness if we were to implement them?

Networks reflected a range of deliverables that were similar, yet detailed the regional differences in the implementation of their pilot. Deliverables included:

- standardized tools and procedures including a contract, workplace essential skills needs assessment, costing process, follow up with employer and learners, information and referral process, marketing process
- a workplace materials database developed including authentic, contextualized materials
- workforce readiness programming and a process to retool programs

- the number of organizational needs assessments, contracts, workshops and results
- customized one-day workshops for employers

The use of the readiness scale to measure progress was cited as an effective tool. The readiness scale was developed by MTCU to assist first sites in measuring their progress around workforce and workplace readiness. For example, it is useful in examining improved group collaboration and understanding, clarity of roles, and tasks of all groups involved.

Recommendation:

That MTCU provide financial support to collect authentic workforce materials by community. This is a central role that needs to be played in each region and when that role is carried out by instructors there needs to be built in replacement costs for supply instructors. A generic workforce database of authentic materials is not enough. Financial support must include replacement costs for supply teachers if they are collecting the materials. Financial support is also needed for teacher preparation time to get comfortable with authentic workplace documents

7. What would the costs be for the models and what would these costs include?

The networks agreed that the costs of developing and implementing workplace literacy would be \$50-60,000 per year per network as per the phased-in approach discussed under question 5. They noted that while developmental costs go down after the first few years, there is more administration once the model is up and running and programs are being delivered.

Examples of the costs of developing a collaborative broker model include:

- salary for a workplace coordinator
- office space

- development of workplace materials
- training of practitioners
- compensation for agencies for time in coordination development
- salary for a marketing person
- office costs (telephone, photocopying, mailing, and travel, meeting expenses)
- administration of contracts

Recommendation:

- That MTCU provide \$50-60,000 per year per network to develop and maintain a successful workplace literacy model as part of its workplace literacy strategy.
- That networks track the actual costs of developing and maintaining a successful workplace literacy model.

Workforce Literacy

8. Workforce literacy is defined as LBS delivery agencies using methodologies and materials relevant to learners who have employment as a goal. How have workforce literacy services changed in your communities as a result of your involvement as first sites? What kinds of evidence can you offer to support the changes?

All networks identified positive changes that had occurred as a result of being a first site. They indicated that there was more familiarity, comfort with, and understanding of workforce and workplace literacy on the part of LBS programs.

Some of the changes included more understanding on the part of program administrators and practitioners as to the importance of collecting and using authentic workforce documents in programming. Workforce activities are now in business plans and LSPs. There are more connections with employers. There is more training for front-line practitioners on workforce specific training issues and

material, and knowledge of further needs in this area. Programs and networks are collecting authentic materials.

However, networks stressed that they were concerned about programs' readiness to deal with workforce literacy. They stated that the training that had been provided was just the tip of the iceberg. More training in workforce literacy is needed that focuses on different levels of experience and expertise. The networks also said they would have liked a full year just to focus on workforce readiness.

Recommendations:

- Provide a year to develop and/or assess workforce readiness on the part of literacy agencies before developing a model for workplace literacy.
- Provide comprehensive training in workforce literacy that corresponds to both LBS administrator and practitioner experience and expertise.

9. What further steps will you take to improve workforce literacy services in your communities?

All networks stressed the importance of gathering and using workforce authentic materials. They said that continual communication and clarification of the purpose and importance of the workforce initiative is necessary. Some of the future activities planned by the networks include:

- ongoing workforce sessions with LSPs that will include resource sharing, and will culminate with a binder of information on workforce programming for LBS instructors
- revision of current marketing material so that it better promotes and reflects workforce literacy, and the development of strategies and procedures for finding, understanding and using local labour market information; an expressed goal is to incorporate workforce from intake to exit (assessments, training plans, goal setting, demonstrations, and evaluation)

- identification of industrial niches that have entry level jobs that learners may qualify for

Recommendation:

- That MTCU place the same/consistent expectations of all MTCU programs (not just pilots) to prepare them to deliver workplace training.

10. What will you need?

All networks requested more financial support (see previous discussion in this report). Other supports needed are:

- facilitated and coordinated support from the OLC has been helpful during this pilot process and would be helpful for other networks
- MTCU continuing to be upfront, forthcoming and timely with information and expectations
- consistent messages from all MTCU field consultants
- identification of employment sectors by agencies for which work-authentic documents are needed
- money to purchase resources and to provide workshops for sites

11. What steps can MTCU take to improve the capacity of the LBS delivery system to deliver workforce literacy?

Networks stressed that all LBS agencies need to develop their capacity to deliver workforce literacy whether they are part of a first site or not. A strong, clear, consistent message with respect to MTCU’s expectations needs to be delivered through the field consultants.

Specific steps that MTCU can take to build the capacity of the LBS delivery system to deliver workforce literacy include:

- continue advocating and articulating the importance and expectation that workforce delivery is an LBS mandate
- provide funding for a workplace coordinator in order that the person can support the agencies in their efforts in order to increase sustainability
- increase funding to continue development work that includes:
 - developing a regional workforce/workplace implementation plan
 - providing face-to-face meetings with ministry, networks, and agency representatives at the same table
 - continuing to make projects that address workforce needs a priority
 - providing workshops

Workplace Literacy Marketing

12. Briefly describe any marketing you conducted during the time you were a first site. Include market analysis you conducted, outreach and sales strategy, first contacts, and any contracts arising from your work.

The networks are in varying degrees of development with respect to marketing. They will not have results until early in 2003. Marketing strategies have included the use of a staff person and a professional marketer. The networks stressed that regardless of whether it is a staff person or a professional marketer, the person needs to be skilled in marketing.

Examples of activities undertaken by the networks include:

- the development of a marketing plan and materials
- public service announcements marketed to radio stations
- close contact maintained with local training and adjustments boards
- partnerships with local businesses

The networks stressed that the danger of marketing, before ready, puts the project in jeopardy. They emphasized that marketing is definitely the last stage of development.

Recommendation:

- That the provincial government develop and implement a provincial message to promote workplace literacy to supplement local marketing efforts.

13. How did you evaluate the success of your workplace literacy marketing? What would you do differently?

This question is premature. Evaluation of workplace literacy marketing will happen in the future. There are a range of activities that networks are putting in place to evaluate the success of workplace literacy marketing that include:

- getting comments and feedback from target audiences
- having a certain number of workplace contracts in place
- having a certain number of ONAs or contracts in place before the end of the pilot phase

14. How did you use the “Hire Value” materials?

This question is premature. All networks have the “Hire Value” materials as part of a collection of marketing materials, but most have not used them yet. In one case, the “Hire Value” package has been distributed at trade fairs, information sessions, small business expos, and presentations to employers along with other materials. Responses indicated that these materials would be useful for building awareness around workforce and workplace literacy.

Workplace Literacy Professional Development

15. What kinds of training to develop capacity would you recommend for LBS practitioners? Who should be trained? How should they be trained?

Networks agreed that a considerable amount of time has been spent on building the capacity of LBS agencies to deliver workforce literacy. As a result, marketing activities for workplace activities have been delayed.

Networks reemphasized the need to offer orientation and training to build workforce capacity first before moving on to workplace literacy. Training and orientation for workforce and workplace literacy must address the needs of a) administrators and b) practitioners. For example, administrations need to work with their boards to develop a “fee for service” view and develop organizational commitment for workforce and workplace literacy.

Responses indicated that there should be a variety of training for administrators and practitioners. Suggestions for content included:

- assessment
- workforce and workplace curriculum development
- understanding the culture of workplaces
- “do’s and don’ts” of marketing
- the “how to’s” of developing fair and competitive contracts and fee structures

Some responses indicated that the training should include similar themes as to what has been offered so far through the OLC training, but in a more extensive manner. One network grappled with the idea of hiring practitioners who have relevant business experience and training them on workplace literacy issues. Another suggested training where inexperienced practitioners could work with experienced staff on case studies.

One suggestion to orient those new to workplace literacy was to provide the opportunity for questions and answers with a panel of experienced representatives.

Networks agreed there should be a specialized pool of trainers, who have been given focused training in order to be prepared for workplace customization.

Networks also reemphasized that marketing is a specialized skill area. They felt that someone with specialized marketing experience needed to be hired within the networks as part of the workplace initiative.

Recommendation:

- Ensure comprehensive and extensive orientation and training for both workforce and workplace literacy separately. Training and orientation for workforce and workplace literacy needs to address the needs of both administrators and LBS practitioners and must respond to varying levels of expertise and experience.

Tracking

**16. How did you track your progress in workplace and workforce literacy?
Describe the methods and the tools you used.**

Networks highlighted the need to track and evaluate workforce and workplace literacy differently and separately. Workforce and workplace literacy have different levels of accountability. Networks emphasized that planning for workforce literacy happens under the LSP as a MTCU funded activity. On the other hand, workplace literacy delivery is not an MTCU funded activity. Currently there is a need for a clearer definition of success from MTCU and the tools to track it.

Furthermore, progress looks different for workforce and workplace literacy. For example, for workforce literacy, student evaluations and number of students who obtain employment could indicate progress. For workplace literacy, revenue generated, number of contracts, as well as evaluations from students could show progress towards goals.

Networks stressed that their role is to support and encourage LBS agencies' success with respect to workforce literacy. They emphasized that although they are responsible for process, they are not responsible for results.

Generally networks are using the readiness scale to track workforce readiness and develop work plans for workplace literacy. Progress on work plans is used to track workplace literacy.

For example, one network is in the process of developing a workforce vision and strategy. The pre-assessment scale was used to develop activities that were realistic for each agency and the network. The scale provided a wealth of information about expectations through descriptions of what was required at different levels.

Another network is basing its progress on the readiness scale. Mid-year progress was reviewed in December. Workforce progress was done in October with the LSP agencies. The results of this tool have led to some necessary project recommendations.

Recommendations:

- That MTCU communicate more clarity with respect to what constitutes success in workforce and workplace literacy.
- That other evaluation tools be identified/developed that measure progress.

17. How did you use the readiness scale? Why did you use it in this way?

Networks said they have used the readiness scale as part of evaluation and measurement for this project, and to help agencies develop their work plans. See previous question for more details.

18. What are your recommendations on how to best track progress in the development of workforce and workplace literacy?

Networks said that the Readiness scale was useful but needs to include more quantitative information. The scale can be used to help agencies create their own workplace and workforce plans. The network should then create workplace plans based on a generalized status of the programs including timeframes, regular reviews, and updates. However, networks noted that there is discomfort around the scale on the part of LBS agencies. There is discomfort around its use and agencies are not familiar with how it will be used in the future. It needs more specific indicators so programs can measure success. Its purpose must be clearly explained.

Future work should build upon previously created templates. Ensure that the tracking process, easy to customize and confidential.

Recommendation:

- Reform the readiness scale with more specific indicators of success so that programs can more easily measure progress and success.

Development

19. Which materials, including those developed under the Workplace Literacy Strategy (since 2000) did you use with learners? What worked well and what didn't? Why?

Since networks do not have direct contact with learners, they thought MTCU could get a more informed response by posing the question to LBS agencies. They noted that they have used a lot of materials with practitioners and hope they are having an impact.

More specifically, some of the materials networks are aware of that are being used include:

- Jane Barber's Goal Requirements Handbook The program using it is finding that learners are responding positively to the experience—they are more focused and have increased morale and “buy in” to the learning process.
- Work Write materials.

20. What would be your priorities for developing workforce learning and assessment tools?

Generally, the networks said that they need until the end of March 2003 to evaluate what tools already exist before developing additional ones. Time and training are necessary to use and evaluate what is already available.

Some suggestions were made with respect to developing authentic materials with demonstrations. Time is needed for instructors to find, develop and share these materials. Developing and storing job classifications (which will hopefully lead to the identification of niche training opportunities by agencies) was suggested as well.

Recommendation:

- Conduct a needs assessment with first sites after a full year (March 2003) to find out priorities for developing workforce learning and assessment tools.

21. What other development priorities would you give for workforce and workplace literacy?

Development priorities for workforce and workplace literacy are woven throughout answers to other questions in this report.